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William G. Spady, Agent of Change: An Oral History

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WILLIAM G. SPADY, AGENT OF CHANGE:

AN ORAL HISTORY

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For Bill

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ABSTRACT

What series of circumstances, events, individuals, and factors have shaped and

changed the life and career trajectory of William G. Spady, sociologist, educator, and

agent of change? This dissertation provided many answers to this guiding research

question. What made this dissertation unique was that the answers were provided by the

subject himself during a series of interviews at his home in Colorado. Spady's life began

as the son of a hard-working garbage hauler and hog rancher in a little town outside of

Portland. Spady attended the University of Chicago, and taught at Harvard and the

Ontario Institute for Studies in Education. He was also an active member of the American

Educational Research Association where he and others helped to create Division G

around the sociology of education. Spady served as Division G's third president. He

worked for the National Institute of Education and served as the director of the National

Center for the Improvement of Learning at the American Association of School

Administrators.

Spady was named Director of the Far West Laboratory, and he leveraged this

position to introduce Outcome-Based Education (OBE) to school systems in Western

states such as Utah, Oklahoma, Oregon, and Arizona. At one time, 26 states offered some

version of Spady's OBE in their schools. OBE came under furious attack in Pennsylvania,

and was jettisoned in most states as a result. However, in 1997, Spady found through a

phone call that OBE had been adopted by the African National Congress to be the

national curriculum of South Africa. Spady spent the next ten years helping to foster OBE in South Africa and Australia. He also was named the Educational Director of HeartLight International. Recently, Spady turned his attention exclusively to U.S. education and policy by creating the New Possibilities Network to serve as a countermeasure to the No Child Left Behind legislation. This dissertation was an oral history of an important agent of change in the midst of his work.

CHAPTER ONE

INTRODUCTION

The name "William G. Spady" did not appear in any of the many curriculum

histories and curriculum handbooks that I read for the first two parts of my

comprehensive literature review on curricular innovation. Maybe Spady was unimportant

in the academic development of the learning outcomes curricular innovation and the

contemporary learning outcomes movement. Maybe he was merely a proselytizer for a

curriculum that he claimed would be transformative; maybe it was because most of his

influence was on K-12 curriculum although his ideas entered the national higher

education curriculum in other parts of the world.

However, his name certainly appeared on the Web in angry polemics launched by

his many U.S. critics: Phyllis Schlafly's Eagle Forum, Probe Ministries, Pat Robertson's

Christian Coalition, Beverly La Haye's Concerned Women for America, Robert Simond's

Citizens for Excellence in Education, the Rutherford Institute, the Heartland Institute,

Rush Limbaugh, G. Gordon Liddy, Pat Buchanan, and the former Secretary of Education

under Ronald Reagan, William J. Bennett. These people and groups vociferously

critiqued Spady's conception of learning outcomes curriculum that he called Outcome-

Based education (OBE). According to one commentator, Spady was described as '"a

socialist, a communist, a globalist, a one-worlder, a new-ager; as anti-Christian, anti-

traditional values, anti-family, un-American, diabolical, duplicitous, subversive; and with a host of other pejoratives"' (Burron qtd. in Spady, xi, 1998).

His name also appeared in the historical accounts and criticism that followed in the wake of the national implementation of Curriculum 2005 in South Africa. According to some, Curriculum 2005 liberally borrowed from various principles, "whose origins and evolution can be traced to competency based debates in Australia, New Zealand, Scotland, Canada and limited circles in the United States" (Cross, Mungadi & Rouhani, 2002, p. 176). However, according to others, Curriculum 2005, although certainly influenced by developments in other countries, actually borrowed most heavily from the work of Spady (Spreen, 2000; Killen, 2002; Weber, 2002; Saib, 2004). The reaction to OBE in South Africa was not as heated as in the U.S. although some Afrikaner Christian groups and academics questioned the value of OBE and critiqued Spady and his innovation (Chisholm, 2005; Mulholland, 1997; Venter, 2000).

My interest in Spady was piqued by the fact that some lone sociologist from a small rural town in Oregon could cause such a national and global fuss over a curricular idea that goes back to Bobbitt. My initial research for this proposal took me to 1967, the year Spady completed his dissertation, *Peer Integration and Academic Success: The Dropout Process among Chicago Freshmen*, a study of first-year attrition at the University of Chicago. The dissertation depended on the use of Durkheim's theory of suicides to explain freshman attrition. Spady's work became the basis of Tinto's theories of social integration and the college experience.

In 1964 and 1967, Spady's work touched on issues of college and class mobility which predated Bourdieu's concept of cultural capital introduced in France in 1973 and popularized in the U. S. with the publication of Bourdieu's "Cultural Reproduction and Social Reproduction" (1977). Spady also studied the value and efficacy of extracurricular activities in higher education. He investigated the effects of unequal resources in education. He explored issues in classroom management and social control in the midst of campus upheaval in the early 1970s. He called for radical reform in education in 2001 with the publication of *Beyond Counterfeit Reforms* and most recently in the 2010 edition of *Total Leaders*, co-authored with Schwan. Recently, Spady was involved with HeartLight International, an educational think-tank steeped in New Age spirituality, financed by Neale Donald Walsch, the author of the best-selling *Conversations with God* series of books.

In the collection edited by Kridel (1998), *Writing Educational Biography*, he and other authors provided considerable rationale for why an oral history or biography could make a compelling and valuable dissertation. Reynolds (1998) believed that an educational biography, such as her own dissertation, a biography of John Andrew Rice, could "illuminate Rice's thoughts about education and his life as an educator" (p. 177). Like Spady, Rice was a controversial maverick. In the midst of the Great Depression, Rice believed that the arts should be the centerpiece of a liberal education. His brainchild was Black Mountain College, a college owned and operated by the faculty, many of whom were recent refugees from war torn Europe. Rather than write an account of the college itself, Reynolds decided to look at its founding as an alternative institution

through the life events of its iconoclastic founder, seeing that as a more compelling way to portray how something as unique as Black Mountain could be realized.

For Bullough (1998), biography was a "powerful means for collecting future lives" (p. 31) to better understand who we are in the educational field and/or institution, to learn how we can produce change, to know where we want to go, and to identify the forces that may hinder that movement. Bullough's own dissertation (1976) was a biographical study of Harold B. Alberty, a pioneer in the development of interdisciplinary curriculum in higher education, and Alberty's mentor, Boyd H. Bode, an early critic of Bobbitt and his purported scientific approach to curriculum. For Bullough, exploring the relationship between the student and his mentor provided insight about enabling future change in the educational field and the obstacles that will inevitably arise. Spady's story was also about educational change and the forces that hinder change or grind change to a complete halt.

Spady is still busy at his home in Colorado and around the globe attempting to radically reform education, yet there is very little written about his life, work, and influence in the U.S. and abroad from an academic perspective. I visited him in his home for a series of interviews over three days and collected almost 26 hours of tape. He was a consummate storyteller with a gift for remembering details and approximating the conversations that took place at the University of Chicago and Harvard, in Frankfurt, in Australia, in Washington D.C., South Africa, and many other places. The bulk of this dissertation is an oral history of a controversial agent of curricular change in the midst of his work.

Review of Research Literature

In his first article on student attrition, Tinto (1975, Winter) credited Spady with introducing Durkheim's theory of suicide to the discussion of college dropouts. Tinto included two of Spady's earliest articles in his bibliography (1970, April; 1971). These two articles were extensions of Spady's dissertation (1967) on first-year attrition at the University of Chicago. According to Durkheim (1961), suicide was more likely to occur when an individual had inadequately integrated into society. Basically, the individual did not share the values of the social system nor did the individual feel an affiliation with the group. Spady applied Durkheim's theory of lack of social integration to the social system that was the university or college. Spady found that those who persisted shared the values of most of the student body, that they usually came from college educated families, that they were usually men, that those students who identified with more conventional values tended to stay in college. Spady's work as extended by Tinto became the basis of social integration theory when discussing retention.

A later article by Tinto (1988, July/August) acknowledged that Spady's original theory still retained "so much currency in research circles" over twenty years after the publication of Spady's dissertation (p. 447). The number of articles referencing Spady provided evidence of this relevance to a wide range of other concerns within the realm of student attrition in higher education. These concerns included attrition at the graduate level (Girves & Wemmerus, 1988, March/April); attrition and financial aid (DesJardins, Ahlburg & McCall, 2002, Summer); attrition and re-entry (Spanard, 1990, Autumn); attrition and distance learning (Kember, 1989, May/June); attrition and the stop-out

(DesJardins, Ahlburg & McCall, 2002, September/October); attrition and African-American students (Thomas, 1981, Summer; Loo & Rolison, 1986, January/February; Castle, 1993, October; Cabrera, Nora, Terenzini, Pascarella & Hagedorn, 1999, March/April; Barnett, 2004, Winter); attrition and Hispanic students (Attinasi, 1989, May/June; Nora, 1990, May/June); attrition and the community college (Peng & Fetters, 1978, Summer; Volkwein, King & Terenzini, 1986, July/August; Strauss & Volfwein, 2004, March/April); attrition in Australia (Baumgart & Johnstone, 1977, September/October); attrition in Denmark (Dohn, 1991); attrition in New Guinea (Mannan, 2001, April); attrition in the Netherlands (Jansen, 2004, June), and many other articles dealing with various effects on and of college attrition (Weidman, Phelan & Sullivan, 1972, Summer; Weidman, 1979; January/February; Hearn, 1980, July; Simpson, Baker & Mellinger, 1980, October; Anderson, 1981, January; Munro, 1981, Summer; Aitken, 1982, January/February; Biddle, Bank & Slavings, 1987, December; Metzner, 1989, Autumn; Bank, Slavings & Biddle, 1990, July; Christie & Dinham, 1991, July/August; Willet & Singer, 1991, Winter; Thomas, 2000, September/October; Leppel, 2001, April; van den Berg & Hofman, 2005, October).

Dissertations on college persistence and attrition have also referenced Spady. These included dissertations on attrition and the community college (Price, 1982; Boggs, 2004; Duke, 2007); attrition and adult learners (Sexauer, 1989; Lund, 1989); attrition and African-American students (Donovan, 1983; McCluskey, 2005; McClinton, 2005); attrition and Native American students (Bedard, 19990; and other topics that concern college attrition and retention (Little, 1982; Healy, 1983; Hardin, 1984; McGinty, 1989;

Haney, 1990; Atakpu, 1990; Cox, 1992; Erickson, 1993; Cargill, 1994; Pincus, 1995;

Villanueva, 1998; Cook, 1999).

Pascarella and Terenzini (1977, September/October) used Spady's early research on

attrition to measure the effectiveness of faculty-student interaction outside of the

classroom in improving persistence. Pascarella, Terenzini, and Hibel (1978,

September/October) used a synthesis of Spady's attrition model and Chickering's

conceptual model that claimed that informal faculty-student contact had an ameliorative

effect on student achievement to measure the effect of faculty-student interaction on

voluntary freshman withdrawal at Syracuse. Later, Pascarella and Terenzini (1979,

October) developed a composite of the conceptual models of attrition theorized by Spady

and expanded by Tinto, and they (1980, January/February) depended on the composite

model based on Spady and Tinto's work to measure the effect of formal and informal

faculty-student interaction on voluntary freshman withdrawal at Syracuse. In a series of

articles with each other and other authors, Pascarella and Terenzini documented the

deployment of the model that emerged from the work of Spady and Tinto to study the

effect of faculty-student interaction on voluntary withdrawal (Pascarella, 1980, Winter;

Pascarella & Chapman, 1983, Spring; Pascarella, Duby & Iverson, 1983, April;

Pascarella, Terenzini & Wolfle, 1986, March/April).

Bean (1981) created an influential causal model of student attrition based on a

synthesis of various theories of student attrition which included Spady's student

integration model along with Pascarella's model based on faculty-student interaction.

Bean and various co-authors referenced Spady in articles based on this causal model

(1985, Spring; Bean & Metzner, 1985, Winter; Bean & Bradley, 1986, July/August).

Studies have also been based on a comparison between Spady's student integration model

and Bean's student attrition model (Cabrera, Castaneda, Nora & Hengstler, 1992,

March/April; Cabrera, Nora & Castaneda, 1993, March/April).

However, with the advent of multiculturalism Spady's model of student integration

was criticized as repressive and normative. Attinasi (1989, May/June) found Spady's

model distasteful since it was based on a study of suicides in various cultures. Hurtado

and Carter (1997, October) criticized the idea of "membership" itself or the meaning of

"affiliation," which were concepts important to Spady's theory. They believed that the

theory did not "capture the multiple communities on campus and students' multiple

affiliations without adopting a single or predominant set of norms" (p. 327). Tierney

(1992, November/December) called for a complete rejection of the social integration

theory espoused by Spady, Tinto, and others in search of a new model that viewed

universities and colleges as "multicultural entities where difference is highlighted and

celebrated" (p. 604).

Spady's thesis in 1964 was a study of social class and status and their effects on

seniors in high school and their aspirations for postsecondary education. The thesis led to

a study of social class and race in higher education titled "Educational Mobility and

Access: Growth and Paradoxes" (1967, November) that posited that "having a better-

educated father was a clearer advantage than being white" when it came to occupational

and social mobility (p. 283). The study also showed that a person with a college

education, regardless of the education level of one's father, had a distinct advantage in the

realms of social and occupational mobility over a person without a college education. Consequently, Spady's study was referenced in studies on social stratification (Lasswell, 1969, July; Feldman, 1969, Summer); the social inequality of education (Sorensen, 1971; Sewell, 1971, October; Mare, 1981, February; Mare & Chen, 1986, June; Mare, 2006); social class and academic ability (Feldman, 1972, Winter; Karabel & Astin, 1975, March); social mobility and education (Jarmon, 1976, July; Richardson, 1977, Autumn); the effects of college on the social class structure (Cope, 1973, May; Weiner & Eckland, 1979, January; Mare, 1981, January); and equal educational opportunities in France (Garnier & Raffalovich, 1984, January).

Spady (1970) turned his attention to the effects of peer status and extracurricular activities on success orientation in high school and later in college. He found that the perception of peer status was "positively related to goals but negatively related to their fulfillment." He found that extracurricular activities could help achieve goals regardless of "family status and academic performance" (p. 680). However, only certain types of extracurricular activities, like athletics that enhance high school peer status, would easily translate to postsecondary aspirations and success. Spady's work on peer status, educational aspiration and sports appeared in studies on high school organization (Hawley, 1971, December); the educational aspirations of Canadian adolescents (Williams, 1972, Spring); athletics and educational expectations (Spreitzer & Pugh, 1973, Spring); the sociology of sports (Snyder & Spreitzer, 1974, Autumn; Guttman, 1979, September; Luschen, 1980; Reiss, 1980, Winter); youth and alienation (Otto & Featherman, 1975, December); sports and women (Snyder & Spreitzer, 1977, January;

Hanson & Kraus, 1998, April); rural schooling, race, and sex (DeBord, Griffin & Clark, 1977, April); high school sports and occupational mobility (Otto & Alwin, 1977, April); the effect of extracurricular activities on membership in adult voluntary organizations (Hanks & Eckland, 1978, Summer); status attainment (Colclough & Horan, 1983, Winter); the effects of interscholastic sports on adolescent crime (Landers & Landers, 1978, October; Peek, Picou, Alston & Curry, 1979, October; Landers & Landers, 1979, October); athletics and educational attainment (Purdy, Eitzen & Hufnagel, 1982, April; Adler & Adler, 1985, October; Hossler & Stage, 1992, Summer; Broh, 2002, January; Eitle & Eitle, 2002, April; Feldman & Matjasko, 2005, Summer); other empirical research on the effects of extracurricular activities (Holland & Andre, 1987, Winter; Taylor & Chiogioji, 1988, Spring; Brown, 188, Spring; Chamber, 1991, May); extracurricular activities and high school attrition (McNeal, 1995, January); and the arts and urban schools (Quinn & Kahne, 2001, Spring).

Spady's initial study on the effects of sports and extracurricular activities on success orientation led to a study (1971, May) that claimed that "the greatest facilitator of college success is the extracurricular involvement of the student during high school" (p. 397). These findings were discussed and referenced in studies on school policy (Erickson, 1976, Autumn); the role of girl friends on male achievement (Otto, 1977, September); youth and political participation (Hanks, 1981, September); achievement orientation (Howell & Frese, 1981, September); high school attrition (Finn, 1989, Summer); and the arts and academic achievement (Winner & Cooper, 2000, Autumn/Winter).

Spady (1973) studied the effects of school resources on student outcomes, and he found that family background had more of an influence on academic achievement than expenditures. However, he claimed that the more affluent the family the better chance for a student to achieve the prescribed outcomes. His work was discussed and referenced by studies on black-white inequality in schooling (Lewis & St. John, 1974, March; Darkenwald, 1975, Autumn; Patchen, Hofmann & Brown, 1980, January; Thornton & Eckland, 1980, October; Jones, Burton & Davenport, 1984, March; Rowan & Denk, 1984, Autumn; Hallinan, 1988; Hallinan, 2001); the politics of education in the U.S. (Peterson, 1974; Fincher, 1974, February; Boruch & Wortman, 1979); school contexts and their effects on learning (Bain & Anderson, 1974, Autumn; Barr & Dreeben, 1977; Alwin & Otto, 1977, October; Sorensen & Hallinan, 1977, October; Hallinan & Tuma, 1978, October; Lindsay, 1982, Spring; Anderson, 1982, Autumn; Dar & Resh, 1986, Autumn; Oakes, 1989, Summer; McCartney & Jordan, 1990, January/February; Wang, Haertel & Walberg, 1993, Autumn); teacher effects (Schalock, 1979; Centra & Potter, 1980, Summer; Rosenholtz & Smylie, 1984, November); Jewish education (Himmelfarb, 1977, Autumn; Himmelfarb, 1977, April); research and inquiry (Hallinan, 1976, Autumn; Burstein, 1980); and other topics (Spenner & Featherman, 1978; Lindsay, 1984, Spring; Hativa, 1988, Autumn; Hallinan & Williams, 1990, April).

During the 1970s, Spady (1973, January) also became interested in issues of authority, student unrest, and classroom management. The articles that followed were theoretical examinations based on the work of Weber and others rather than sociological studies based on quantitative data (1974; 1977). The 1973 article, "Authority, Conflict,

and Teacher Effectiveness," was discussed and referenced by studies on faculty supervision (Rugg & Norris, 1975, Winter); faculty quality (Mirin & Segal, 1978, February); and the effect of class size on teacher performance (Cohen, 1983, November). Two dissertations also referenced this work (Bowe, 1980; McDonald, 1998). This article was expanded and published in *Uses of the Sociology of Education* (1974). This newer version was discussed and referenced in studies about classroom organization and social control (Williams, 1976, July; Bossert, 1977, August; Lightfoot, 1977, Winter; Henderson, 1979, Spring; Leiter, 1981, Spring; Bossert, 1983, November; McDill, Natriello & Pallas, 1985, Winter; McDill, Natriello & Pallas, 1986, February).

Spady's 1977 article on power, authority, and empathy in the classroom was discussed or referenced by three studies of classroom management (Martin, 1978; Buckley & Cooper, 1978, March; Clifton, 1979). Spady's interest in classroom management and authority extended into the late 1970s with his co-author Mitchell (1979). Spady and Mitchell's work was referenced in studies of teaching, policy, and standards (Porter, 1989, Winter; Porter, 1993, June/July; Porter, 1994, August); classroom management in secondary schools (Macbeth, 1990); and local curriculum policy (Tyree, 1993, Spring). In the 1990s, Mitchell and Spady (1993, Winter) co-authored one last work on authority and power in the classroom. This work was referenced by a sociological study of graduate students and their faculty supervisors (Aguinis, Nesler, Quigley, Lee & Tedeschi, 1996, May/June) and two dissertations on leadership and social control (Armstrong, 1994; Dickerson, 1996).

By the late 1970s, Spady had basically abandoned sociological studies to concentrate on his vision of curriculum: Outcome-Based Education (OBE). His earliest article toward the vision that became OBE appeared in an article included in *Schools, Society, and Mastery Learning*, edited by Block (1974) titled "The Sociological Implications of Mastery Learning." However, the earliest reference to Spady's own brand of OBE was found in "Competency Based Education: A Bandwagon in Search of a Definition" (1977, January). This was his earliest peer-reviewed article informed by a number of unpublished papers presented at earlier conferences. In this article, he reacted to what was happening in the wake of the Oregon State Board of Education's decision in 1972 to require minimum graduation requirements. He saw Oregon challenging "the validity of using time and course credits as bases for certifying student accomplishment and the relevance of current curricula to the life-role demands youngsters would face after leaving school." This challenge was the "first significant nudge" (p. 9) that started an avalanche of change throughout the nation with over twenty states following Oregon's lead by implementing procedures that would lead to what was soon called Competency Based Education (CBE), a form of education espoused by behaviorists such as Benjamin Bloom in his seminal 1968 essay "Learning for Mastery" and James Block (Brandt, December 1992/January 1993, p. 66).

In "Competency Based Education: Organizational Issues and Implications" (1977, February), Spady, along with his co-author, Douglas E. Mitchell, bemoaned the states' interest in looking at competency as an end-all requirement at graduation, proving adeptness at disparate skills, rather than as a continuing integrated process. The first use

of the term "Outcome-Based Education" (OBE) occurred in "Organizational Contexts for

Implementing Outcome-Based Education" (1978, July/August) written by Spady and co-

author Mitchell. For Spady and Mitchell, CBE had been co-opted by state systems to

address technical competency alone. Spady and Mitchell valued technical competency,

but without three other components--social responsibility, social integration, and personal

development--for them, education was unsuccessful.

The three essential components of what Spady later called transitional OBE

appeared for the first time (at least, for Spady) in "The Concept and Implications of

Competency-Based Education" published in October 1978: they were: "outcome goals,"

"instructional experiences that directly reflect those goals," and "assessment devices that

represent the operational definition of the goal itself" (p. 21). Articles such as "Achieving

Excellence through Outcome-Based Instructional Delivery" with Rubin (1984, May)

appeared throughout the 1980s, trumpeting the various successes of OBE in school

districts like New Canaan, Connecticut and others. In the 1980s, Spady (1986, Spring;

1988, October) warned of the necessity for organizational change to accommodate OBE.

However, by October of 1991, Spady and Kit J. Marshall had expanded the vision

of OBE in "Beyond Traditional Outcome-Based Education." In this article, they coined

the term "transformational OBE," and they listed the attributes of transformational OBE

in comparison to those of traditional education. These were: schools, programs and

processes were all "outcome defined" and "designed down" from the exit outcomes to the

first day in class; expanded opportunities were given for all learners; credit was earned

through accomplishment with clear criteria; "instructional coaching" was valued rather

than the sage-on-the-stage; a cross-curricular approach was valorized; all learning was based on culminating achievement and oriented to inclusion and inclusionary success, characterized by cooperative learning, and by high expectations, and also by collaborative structures (p. 68). What was most valued was that *all* students can learn and can learn life-roles. The authors pointed to a transformational OBE program in Aurora, Colorado that listed exit outcomes that produced: "collaborative workers," "quality producers," "involved citizens," "self-directed achievers," and "adaptable problem solvers," among others (p. 71). Spady's interest in preparing students for life performance roles, unencumbered by time constraints, was also discussed in "Choosing Outcomes of Significance" (1994, March).

In his 1994 book, *Outcome-Based Education: Critical Issues and Answers*, Spady offered a detailed map on how to transform an educational system at the micro as well as the macro-level. The book constantly emphasized some of the same things about traditional education based on Fordist models that he rejected in his earlier articles. However, he claimed that things were different now, that the Information Age required "different outcomes of students and their schools, different curricula, different instructional approaches and learning environments, and different patterns of success" (p. 155). In 1995, the African National Congress in South Africa needed to do something radically different to remedy an educational system, steeped in racist politics, broken up into nineteen parts, serving four different constituencies. Spady's brand of OBE seemed like the solution.

According to Spreen (2004) in "Appropriating Borrowed Policies: Outcomes-Based Education in South Africa," Spady's revolutionary, transformational approach was the one that directly influenced the educational model adopted by the South African Department of Education in 1997, the approach to be advertised as Curriculum 2005, to do things differently (p. 103). Saib (2004) in her dissertation, *The Role of the Senior Management Team in Managing Outcomes-Based Education*, also claimed that Spady's version of OBE was the template for Curriculum 2005. In the introduction, Saib weaved quotations from Spady's *Outcome-Based Education: Critical Issues and Answers* with text taken from the South African Department of Education's "Lifelong Learning for the 21st Century" and the *National Curriculum Statement,* discussing the "learner-centered" approach that was South African OBE (p. 3). However, Spady was not mentioned in any official document leading up to the adoption and implementation of OBE in South Africa, and he was effaced in much of the expert commentary that surrounded Curriculum 2005. Ironically, Spady (2007, March) himself sounded the death knell of OBE in South Africa in "It's Time to End the Decade of Confusion about OBE in South Africa" in an Afrikaner language peer-reviewed journal, the *South African Journal for Science and Technology*.

In the U. S., Block discussed Spady and Mitchell's (1977, February) and Mitchell and Spady's (1978, July/August) conception of CBE in three articles (1978, May; 1978, Winter; 1980. Winter) as did a group of other writers (Perry, 1980; Shepard, 1980; Firestone, 1994, Autumn; Bailey & Merritt, 1997, August; Auerbach, 1986, September). Boyd and Crowson referenced unpublished papers on OBE presented by Spady (1981),

and Boyd referred to an unpublished presentation by Spady in an article (1983, November). Two peer-reviewed articles referenced Spady and Marshall's (1991, October) article (Villa, Thousand & Chapple, 1996, Winter; Skrtic, 2005, Spring).

Studies from other countries discussed and referenced Spady's *Outcome-Based Education: Critical Issues and Answers*. These included studies from Canada (Wien & Dudley-Marling, 1998, Autumn), Australia (Hargreaves & Moore, 2000, March), the United Kingdom (Harden, 2007), and South Africa (Nekhwevha, 1999, November; Weber, 2002, August; Botha, 2002). Two dissertations discussed Spady's conception of OBE (Horneff, 1994; Mazzeo, 2008), and one titled, *An Axiological Study of the Spady Model of Outcome-Based Education*, explicitly was concerned with Spady's model and its effect on the values of educators in Oklahoma (Ladd, 1994).

At the millennium, Spady switched gears to team with co-author Schwahn, turning their attention to issues of leadership in education. In 1998, they published *Total Leaders: Applying the Best Future-Focused Change Strategies to Education,* a compendium of change strategies inspired by managerial thinkers like Peters and Waterman, but applied to educational institutions. Schwahn and Spady's Total Leader model was referenced in three fairly recent dissertations (Cooper, 2003; Kenneth, 2002; Kenworthy, 2007). Spady and Schwahn co-authored two more articles on leadership published in peer-reviewed journals (Schwahn & Spady, 1998, April; Spady & Schwahn, 2001, December), and Spady authored one alone (2002, January). However, there was a very significant drop-off in peer-reviewed articles discussing or referencing Spady's latest

work in curriculum reform or leadership in comparison to his earlier work on attrition,

social mobility, extracurricular activities, school resources, and classroom management.

Research Questions

- What series of circumstances, events, and individuals have shaped and changed

  Spady's life and career trajectory?

- What factors affected Spady's thoughts, values, and beliefs about education?

- How do his thoughts, ideas, and values correlate with the events in his life in

  education?

Research Methodology

Denzin (1989) invoked Derrida, Lacan, Jameson, Barthes, Foucault, and other post-

structuralists to make the claim that a life was a "social text, a fictional, narrative

production," that a life was not just "captured and represented in a text" (p. 9). For

Denzin, an individual's life was an "unfinished project or set of projects" and that an

individual attempted to organize that project or projects around her identity or personal

idea of biography (p. 29). The rub was to find significant events in one's life to act as

organizers or meaning-makers to have something more tangible to wrap around personal

ideas about identity and biography. For Denzin (1989), the biographer's primary job was

"to build shareable understandings of the life experiences of another" (p. 28).

Wagner-Martin (1998) suggested that the biographer must learn and "determine

which events have been most important to the subject" (p. 96). Denzin's approach to

interpretive biography echoed Wagner-Martin; it depended on the "studied use and

collection" of qualitative data such as interviews and documents that described "turning-

point moments" in someone's life (p. 13). Denzin called these turning points or significant events in one's life "epiphanies" (p. 22). An epiphany could be a problematic event, a defining moment, or a revelation of some sort. Epiphanies were moments that left marks, moments of crisis, moments that changed "the fundamental meaning structures in a person's life," moments that could be bad or good (p. 71). These moments could be re-experienced through intensive interviewing, structured through narratives, and via analysis and interpretation provide shareable understandings of a person's life.

At the heart of researching someone's life were the interviews which consist of the questions that need to be answered in order to locate the epiphanies or significant life events that could structure the oral history and create meaning. Seidman (1991; 2006) provided a model for what he called "in-depth, phenomenological interviewing" that depended on a three interview series (p. 16). The first interview would "establish the context" of the biographical subject's experience; the second interview would provide a space for the subject to recount and "reconstruct" the lived life within the context in which it was experienced; and the third interview would be an encouragement for the biographical subject to critically self-reflect on the meaning of his experience. Thus, interview one would be a "focused life history" that would reconstruct the past events; interview two would concentrate on the details of the subject's present experience in light of the past; and interview three would be an opportunity for the subject to reflect on the meaning of his experience.

Seidman believed that the interviews should be spaced three days to a week apart. The interviews with Spady took place over three consecutive days in June, 2010 at his

home in Colorado and a nearby restaurant. Admittedly, the interviews being conducted over three consecutive days may have limited Spady's time to reflect on his answers and let the questions resonate for a while. However, the limited breaks helped to maintain focus.

Using Seidman's approach, I asked primarily open-ended questions such as "How did you end up in South Africa in 1997?" This allowed Spady to reconstruct his past utilizing significant events that could be viewed as epiphanic in Denzin's sense. My job from there was to build upon the responses to explore Spady's life further. Sometimes this became exasperating for Spady because of my decided lack of skills as a novice interviewer. His exasperation was evidenced on the first recordings and in the early transcripts. The saving grace was that I became increasingly comfortable with being quiet while he created a mosaic of details and replicated conversations that I pieced together later into a coherent narrative.

Seidman suggested a 90 minute limit per interview, but he was discussing multiple interviews with multiple participants. The interviews with Spady were much longer. The first interview was seven hours long over two meetings in one day to establish the context of Spady's life. He discussed his past: his family life, his education, and OBE. The second interview focused more on the immediate past, in the last decade or so. The interview was about seven hours long over two meetings in one day. He began to reflect upon his past using his more recent experiences, specifically, regarding the HeartLight Foundation. The third interview was about five hours long, and Spady used much of that time to reflect upon his own experience and the interview process itself.

Goodson and Sikes (2001; 2009) suggested that the biographer invite the subject to provide a timeline of his or her life. Spady e-mailed a timeline of significant events in his life, everything from mundane stuff like a birth date to a description of childhood family life to education to marriage/family. This saved time, and it provided me with fuel for specific questions, allowing me to name names from his past.

The interviews were taped with a digital handheld recorder. I wanted to do what Tagg (1985) called a "'hot' transcription," so that the interview would be fresh in my mind. Ideally, I would have transcribed the interview as soon as possible and even before the next interview. This would have allowed me to re-live the interview and would have afforded me a chance to modify the follow-up questions in the next interview. That couldn't happen. Fortunately, my sister-in-law who was a court reporter graciously did the initial transcribing very quickly when I returned home. I then went over the tapes very carefully while re-transcribing her first attempt.

Seidman cautioned the interviewer to make note of non-verbal gestures, coughs, pauses, noises, and other interruptions as these may yield meaning. I noted each "er" and "um." I also noted coughs, laughter, deep breaths, and ringing phones. I also called Spady after the material was transcribed and I had gone over every bit of the transcription. I needed to make sure that the names were spelled correctly. I also checked with Spady during the last telephone call to find if what I deemed epiphanic was epiphanic to him.

Data Analysis

For Seidman, the first step for analyzing the text of the interview was to mark the most interesting passages, what he called "meaningful" pieces from the transcript; thus,

the material would be automatically reduced making it easier to handle and digest (p. 117). In my case, the most interesting passages would be the epiphanies. I bolded these passages in the initial transcriptions. I also bolded important events and names of the people he discussed. Mostyn (1985) quoted Berelson who claimed that: "'Content analysis does not differ from close reading plus judgment, a traditional and time-honored method'" (p. 115). Mostyn championed a four-step process inspired by Gordon that demanded listening and reading critically; probing questioning of the data, such as "What does this really mean?"; searching for "meaningful relationships" in the interview data; and synthesizing the material (p. 116). I was dependent on my literary analysis skills which have always been marked by a reliance on very close readings with a post-structuralist bent informed by the work of Lacan, Kristeva, and others.

Seidman also claimed that some of the most important things to look for when analyzing the transcript was conflict of any sort, internal or external. He also believed that the reader/interviewer should be sensitive to expressions of hopes and their fulfillment (or not), "language that indicates beginnings, middle, and ends of processes," "frustrations and resolutions," feelings of "isolation," and how expressions of power can affect individuals (p. 118). Seidman bluntly declared: "If it catches your attention, mark it" (p. 118). The idea for him was that the reader must trust herself.

I marked those passages and labeled them by theme. Seidman suggested making two copies of the transcripts so that the original would be saved intact, but the other would be cut up and sorted into folders that would share the thematic label. I saved all of the original transcriptions, but I cut and pasted passages and divvied them up into twenty

thematic groups which included Educational Change, South Africa, University of Chicago, Harvard, HeartLight, and others. Tagg (1985) explained that this "themal analysis" should be conducted "intuitively extracting small chunks of text on particular themes to see if, when presented together, they may lead to interpretive insights" (p. 180). The marked passages from the original transcripts constructed a new transcript of only the marked passages.

The new version was read with a jaundiced eye. The most compelling passages from the new version were saved. The rest were kept in another "wastebasket" of passages I didn't want to part with yet. The narrative emerged from the most compelling underlined passages. Mostyn urged the interviewer to look for "regularities" in "single words, themes, or concepts" to help the interviewer to look at things from a phenomenological perspective, that is, the view of the subject, while searching for "manifest and latent meaning" that may emerge from interpretation of these words and themes (p. 118).

Tagg (1985) suggested the use of corroborative material that may help "reduce the demands on accuracy" and allow the interviews to supply the "illustrative insights" for factual material (p. 193). This included literature by Spady, works by authors who have discussed or referenced Spady, documents from conference presentations or seminars, and personal documents. The narrative of Spady's life, his biography, emerged from the culled transcripts, the notes, documents, and follow-up.

Limitations

Most of the proponents of the biographical approach to qualitative research in education were forthcoming in sharing its limitations. Early in the preface to his work, Denzin conceded one of the most serious shortcomings of the biographical approach: that it "is only given in the words that it was written about it" (p. 7). The biographer is clearly at the mercy of language and all of its indeterminancy and ambiguity. Bullough cited biography's lack of a control over predictable outcomes as a limitation. The biographer may have a basic idea of what she may be getting into, but surprises will abound. Goodson and Sikes believed that life history or biography was dependent on "faith and belief" in what the biographer knows about "fundamental theories of social life" and "explanations of human action" and behavior (p. 2). Brenner claimed that some bias was unavoidable in the world of intensive interviewing because the biographer was becoming intimately familiar with the subject's life.

Tagg saw limitations in the biographical approach attached to its reliance on memory. Tagg also believed that trust was an issue. The biographer had to trust that the reconstruction of the subject's past was in good faith, and the subject had to trust that the biographer would get it right. Finkelstein referred to an "assault" on biography launched by Jill Kerr Conway who saw biography as a "demagogic" view of history that saw "power inequities" glossed over by "a rosy veneer of individual accomplishment" (p. 45). Pinar and Pautz warned of the "biographer's autobiographic voice" that may "overwhelm or distort" the voice of the subject (p. 67). Miller told of those researchers who eschewed biography as legitimate research. These researchers relied on cold, hard, objective facts;

they believed that a life wasn't measurable, that biography depended too much on

interpretation and the biographer's literary skills. Seidman cautioned that a dissertation in

the form of a biography may not be taken as seriously as one based on positivist or

traditional quantitative scientific principles, that doctoral candidates would be less

credible if they depended on this sort of qualitative research.

     Ultimately, this dissertation was unabashedly postmodern. It contained Spady's

truth or at least the most recent version of his truth. In it, I didn't challenge the actual

veracity of Spady's story. I also recounted Spady's interpretations of things he read, such

as the books by Walsch, rather than rely on my own analysis of this author's work. I

allowed the source to discuss his triumphs and travails in the world of educational change

in his way to better prepare other agents of change. I think that Spady provided some

profound lessons.

CHAPTER TWO

SPADY'S YOUTH AND EDUCATION

Youth in Oregon

William G. Spady was born on February 25, 1940 to William George, Sr. and

Edith Deines Spady in Portland, Oregon. Spady said that it was one of the first times that

Grandma Spady smiled since the death of her husband. All four of Spady's grandparents

were born in the Volga Region of Russia and immigrated to North America at the turn of

the 20th century. Spady's father was the oldest of three; he had two younger sisters.

Spady's mother was the youngest of 12. His parents were from families described in

German as the *Wolgadeutsche* which means "Germans from the Volga."

According to Spady, Catherine the Great, the Czarina of Russia, because of her

own German descent, found great value in her German counterparts' profound interest in

hard work and agriculture. Hundreds of families emigrated to Russia and started colonies

along the rich shores of the Volga River. The Czarina granted a one hundred year amnesty

from mandatory military service to these colonists to concentrate on farming the region.

However, they were ostracized by their Russian neighbors who were unhappy with the

Czarina's arrangements with the *Wolgadeutsche*, and these German colonists found that

they needed to move elsewhere to avoid a violent backlash.

Many of the *Wolgadeutsche* moved to North America, and because they were

successful farmers in Russia, they gravitated to the Midwest, specifically North and South

Dakota, Kansas, and Nebraska to take advantage of the farmland in the Great Plains.

Some homesteaded in Colorado. Others plowed fields in Fresno, California. Many skilled

Wolgadeutsche craftsmen emigrated to Portland, Spady's hometown, and become

involved in the furniture, cabinetry, and woodworking industries. Some of these

individuals settled in a neighborhood in Portland called Albina, and through bitter

disagreements and internal politics created four disparate and uncommunicative

neighborhood churches, splitting the *Wolgadeutsche* into four separate factions in

Portland.

Spady's father's family and his mother's family belonged to one of the churches,

and that was where his parents first met. According to Spady, his parents and their parents

valued one thing above all. Spady described this value in a single word: *schaffen*:

> The one word that characterized everything--in their dialect, my grandma would
> say *schaffen*. *Schaffen* is a German word, and that means 'work, productive work,
> create something productive.' Everything was about work, work, work… [My
> father] never finished high school. He finished two full years. Very industrious,
> very conscientious, very honest, very hard working, not a man of letters, never
> understood all this trumpeting stuff. What was 'sociology'? Never understood
> that. But [he] wanted me to get educated. That's the part he understood. (W.G.
> Spady, interview, June 13, 2010)

Spady's father valued work above all, and he was tireless. When Spady's grandfather,

Hans-Georg, died of a ruptured appendix, William George Sr., at the age of seventeen,

took over the family's trash hauling business in Portland, Oregon.

Even at such a young age, Spady's father was "extremely enterprising," and Spady added that his father "was very smart with money most of the time." In 1949, his father bought 60 acres from one of the pioneering families of Portland that was located "up the hill" in Oregon City, which was agricultural land at that time. Spady's father was interested in transforming the land into a vast garbage dump to avoid driving deeper into the rural areas to dump the trash at a larger cost. However, in 1951, Spady's father added to the trash hauling business, buying an 11 acre ranch in the suburbs of Portland to raise hogs and other livestock with a gentleman named Ed Dungy. Dungy and the senior Spady's efforts turned into the largest hog ranch in the state of Oregon with seven acres of pasture land besides.

For Spady, his early life in Oregon City was "like a three-ring circus." His father was still running a burgeoning garbage business while operating Oregon's largest hog farm. Spady's father also raised chickens and cattle and horses. Spady's father even sold eggs to the locals. To maintain these enterprises, Spady was required to do chores every day, and he claimed:

> I have shoveled more hog manure, more horse manure, and more cow manure than any other professor at Harvard ever. I've hauled more garbage than any other professor at Harvard. That's how I got my professional training…It was unending, just unending farm chores for a kid who had grown up in the city. I learned how to work hard, doing very unpleasant things, so it's like that's just how life is. (W.G. Spady, interview, June 13, 2010)

At a very early age, Spady, like his father and mother and the other *Wolgadeutsche*, embraced *schaffen*. This interest in constant and very hard work followed Spady throughout his career.

Spady once described his mother as a "very demanding and very difficult person."
He did not share much more about his mother after that. However, Spady's mother
introduced him to music. His mother insisted on piano. At her urging, he started piano
lessons in 1946 although he was not really interested in learning piano. At that time,
Spady's only motivation to play any instrument was "cowboy songs." His mother was not
very fond of his musical taste. To get him to play piano and attend to his practice, his
parents acquiesced and bought him a book of cowboy songs to learn. Spady recounted his
first recital:

> For my first recital, my solo performance was 'Oh, Bury Me Not on the Lone
> Prairie.' My piano teacher was Mr. Von Bernavitz…He sat to my right. The
> audience was to my left. So I started in on 'Oh, Bury Me Not.' I got to the end of
> 'Oh, Bury Me Not,' and I looked at him, and he nods. There were five verses
> because they had the words there, all right? Well, his nod [actually] meant: That's
> fine. Stop! Except I thought it meant: Keep going! I just lowered my head, and I
> played all five verses. By the time I finished, this whole audience of people was
> on the floor screaming and laughing. It didn't bother me because I had more verses
> to do. So, I played all five verses of 'Oh, Bury Me Not.' (W.G. Spady, interview,
> June 13, 2010)

Even then, Spady demonstrated his persistence and single-mindedness as he plowed
through his cowboy song to the delight of the audience.

Soon Spady moved from piano to trumpet. Spady regularly visited his
grandmother in southern Alberta, Canada, in a town called Castor. In the late 20s,
because of U.S. immigration quotas, many *Wolgadeutsche* moved to Canada to farm.
Spady's grandmother had neighbors who were actually miles away from her homestead.
The neighbors had a son named Victor who owned a trumpet, and Spady already loved
the trumpet because of its prominence in the *Lone Ranger* theme song. Because of Victor

in Alberta and the trumpet lines in the strains of *William Tell* featured in the *Lone Ranger* radio program*,* Spady got a trumpet at the age of eight. Fortunately for Spady, the Portland schools had a strong music program. He played trumpet in the grade school band, and by the time he was ten in the sixth grade he was playing in the Portland All-City Orchestra for youth. He remembered his music teacher at his grade school as "very supportive." He also remembered how much he loved playing the trumpet.

Spady became an accomplished instrumentalist. In 1953, Spady joined the Portland Jr. Symphony, and in 1954 he studied trumpet with Leon Handzlik, who had played with John Philip Sousa. Spady was named first trumpet of the Portland Jr. Symphony in 1955. He later became first trumpet in the Oregon All-State Orchestra. Spady seriously considered the trumpet and music as a career.

Spady learned to bowl in 1947, and he turned into an accomplished athlete at Milwaukie High in Milwaukie, Oregon. He also worked as a sportswriter for the local newspapers. He related a story about a particular baseball game in his youth that betrayed some of the qualities that would be evidenced later in his life: his high expectations for others, his even higher expectations for himself, and his deep disappointment if those high expectations were not met, either by him or his colleagues:

> I had boy cousins about my age. We were all good athletes. We all ended up at different high schools with intense rivalries. Back when I was 13…two of the cousins and [I] played on this summer baseball team that was coached by a guy who was a professional scout for one of the major league teams who was in Portland…He was a scout for the St. Louis Browns…His son was, of course, a hot shot, and my two cousins were hot shots and all this kind of stuff. We had this little rinky-dink team out south of Milwaukie at this little lousy school called Concord.

I was a devastating hitter. I had an average that I never calculated, but it was over 700, at least, and half of them were home runs. I developed great speed and timing and could just kill any pitcher my age…We ended up in the [Oregon] state championship game against my cousins…It was the biggest disappointment of my life. We played in this stadium that was sized for us. I had gone to a couple of games there before we got into the state tournament itself. The minister of our church took me to watch [my cousins] play a game…We walk in to see these guys play a night game. We're [playing] out there in farm fields, and they're playing night games at this place.

We got into this game, and the bad news was [the stadium] was a square; it was like a square…We walk in, and I just said: Oh, my God, he's so slow, the pitcher, my one cousin. He's so slow. I was like: I could just kill this guy. The other guy who was their other pitcher: Oh, my God, he's so slow…My first time up, I just crucified this pitch, and I hit it dead [center]. Normally, it would be over the left field fence. I was a molecule late, and I hit it straight into the deepest corner: 310. I'm 13.

The kid who was the center fielder, I knew him. He was another of the neighborhood buddies whose name was Johnny Damis. He ended up going to Yale, and he just runs back as fast as he can. I'm sitting there like: What's going to happen? I couldn't tell from the arc of the ball how far it was going to go, and Damis gets to the corner and jumps up, and he catches the damn thing. If I had pulled it--Anyway the long story is: We lost when our left fielder tried to catch a line drive that went under his legs with the bases loaded that would have been the third out. They scored a bunch of runs and they beat us…We lost. I was just heartbroken…

We lost because of all these unearned runs. My world just fell apart that day because they were great hot shots, and we were the country bumpkins…That baseball game was one of life's great tragedies…We had a good little team and wonderful camaraderie, and our shortstop drops a pop fly with people on base, stuff that never happened. Everything that could go wrong happened in that game. (W.G. Spady, interview, June 13, 2010)

Spady's story related themes that would reoccur during his later academic career.

He had "devastating" talent as an educator and administrator and presenter. He was confident in himself and what he brought to the "game." He felt comfortable "playing" on a big educational stage, a stage that would soon prove to be global and to include Australia and South Africa. He worked with and was foiled by extremely talented people such as Johnny Damis who would later play college baseball in the Ivy League.

Spady also blamed this loss as he would blame other disappointments on "stuff that never happened," on the unexpected, on the un-called for: The left fielder let one go through his legs. The shortstop dropped an easy pop-up with men on base. He strongly believed that his talents should trump things out of his control. However, he saved some disdain for himself: "If I had pulled it--" triumph would be his. He believed that if he had connected with that ball and done what he expected of himself things would have gone differently. It was also interesting that he chose to tell the story of a "heartbreaking" loss rather than an early triumph.

After that great year in baseball, Spady welcomed a visitor to his house. He was a talented athlete in Spady's grade school and high school who had preceded him. He had been all-state basketball star in Oregon for two years, an all-state quarterback for Milwaukie High, and an extremely skilled ballplayer. He was recruiting Spady to join his team for the summer baseball league. Spady remembered: "Of course, my parents were just awesomely impressed, and I said: No, I have an opportunity to play in the Portland Opera which I did… I would say I was very willing to chart my own course" (W.G. Spady, interview, June 13, 2010). Charting his own course, Spady eschewed organized sports for music and soon his passion became education.

Spady had been influenced by the passion for education demonstrated by two of his teachers at Milwaukie High: George Bouthilet, his English teacher his junior year and his Creative Writing teacher his senior year; and Jack Cruikshank, his American History teacher his junior year. Spady saw them as paragons of education: charismatic, engaging, knowledgeable, and caring. Spade's father was certainly not an educated individual. He

never attended college nor graduated from high school, but he valued education for

Spady. Spade's father had a relative who was a doctor, and Spade's father held him in

high regard and as a shining example for the young Spady. According to his father, this

doctor had made something of himself through higher learning, and he believed that his

son would make something of himself too as a result of a college education. After

graduating from Milwaukie High, Spady left Oregon for the University of Chicago.

University of Chicago

In 1957, Spady entered the University of Chicago and was accepted into the

General Studies in the Humanities Program at Chicago by a committee headed by

Norman Maclean, the author of *A River Runs through It*. Spady recalled weeping at the

filmed version of the novel directed by Robert Redford. Spady felt that he found a home

at Chicago. He believed that Chicago had "a far greater depth than what the education

world could offer young people" during the early 1960s. He loved "constantly reading

Plato and Aristotle." He embraced general education as expressed by the Hutchins

Curriculum at Chicago that required three years of humanities, three years of natural

sciences, one year of mathematics, a year of a foreign language (in his case, and not

unexpectedly, German), and three years of social sciences and the history of Western

Civilization, and finally a course Spady called "OMP" for "Organization, Methods, and

Principles of the Sciences," which was the capstone that integrated the theories and

knowledge.

Jim Davis, the famous sociologist, was one of Spady's favorite instructors. He

epitomized good teaching for Spady, and he first whet Spady's appetite for sociology:

I thought Jim Davis was a marvelous teacher, partly because we had a small group. It was very hands-on. He bent over backwards to create totally clear and meticulous examples. We did things thoroughly. There was tons of one on one. He was interesting, had a good sense of humor. For me, he was one of the very best teachers I had. There were a number of other quote 'well-known Chicago professors' who didn't impress me that much as teachers. (W.G. Spady, interview, June 13, 2010)

Early in his academic career, Spady valued experiential learning ("very hands on"). Spady also admired Davis' work ethic ("he bent over backwards," "tons of one-on-one") as well as his sense of humor. Spady exhibited both qualities later as an instructor and presenter.

In 1959, Spady won the Frankfurt Scholarship from Chicago and attended Goethe University from 1960 until 1961. When he first arrived at Goethe University in Frankfort, he was dissatisfied with the teaching styles of the professors, especially in comparison to an engaging teacher like Davis: "Terrible professors. I was used to dynamic, interesting teaching methods, and it was like drony, drony, drone in German dialects." He took courses in history and in literature. Some were taught in English and some in German, but he attempted to stay consistent with the interdisciplinary humanities program run by Maclean.

Spady also befriended Jerald Brauer who was the celebrated Dean of the Divinity School at the University of Chicago. Brauer had arrived in Frankfort to deliver a series of lectures. Spady, attracted to "anything that [said] University of Chicago," attended Brauer's program. Spady bought a motor scooter in Frankfurt, and he even "scooted" Brauer around the town during his stay at Goethe. They became friends, and they discussed Spady's developing interest in attending the University of Chicago's Divinity School. The program appealed to Spady's taste for interdisciplinary scholarship and

research. He applied to the Divinity School upon his return to Chicago: "That was

something I thought I wanted to pursue, and as it turns out the education passion was way

stronger."

He returned to the University of Chicago to finish his senior year, and according

to Spady:

> There had just been a ton of maturing that had happened for me intellectually and otherwise between the time I left [for Frankfurt] and the time I got back…Just some of the very complex theoretical nuanced stuff that courses demand at Chicago suddenly started to click. It was just a conceptual being-able-to-grasp-things-at-a-different-and-higher-theoretical-level that I think helped a great deal. (W.G. Spady, interview, June 13, 2010)

Before going to Frankfort, Spady said that it was "just levels of abstraction" beyond him

at the University of Chicago. He had admittedly struggled with literary material and

complex literary analysis previously at Chicago even though he was "a star in my high

school at that stuff." However, he took an advanced English course upon his return.

He remembered getting A's right away on couple of papers that he wrote in the

advanced English class. Later in the course, he wrote a paper on Joseph Conrad. Spady

recalled:

> I got an A plus…I would always tell people, if you can get an A in the course you can teach it, okay? They were grading on a curve. They didn't give A's as it were, and I ended up getting an A plus on this paper. Then, I got an A for the course, and I was getting A's in other things. It's like, God, something has happened here. Suddenly, in my final year I was ready for the place. It took that long to mature into the intellectual, analytical synthesis nature of how they did everything…I saw deeper into what [Conrad] had written and I was able to communicate it in a deeper and richer way. (W.G. Spady, interview, June 13, 2010)

His rapid improvement in literary analysis provided evidence of the maturation that

occurred because of his experiences in Frankfort.

After the recollection about his take on Conrad, Spady added that he had never

adhered to a theoretical bias during his education nor based his later curricular

developments on any particular theory of pedagogy: "I would have to say I don't think I

have based any of my work on a philosophical template of some kind." This hearkened

back to his willingness to chart his own course.

Spady had been a successful classical trumpeter, and he possessed the musical

ability to pursue the trumpet as a profession. However, after a conversation in 1962 with

the famed classical trumpeter, Leon Rapier, Spady decided to pursue a career in education

rather than as a musician or even to follow up on the notion to enter the School of

Divinity at Chicago as a graduate student:

> The big passionate motivator when I had that discussion with Leon about what am I going to do when I grow up besides major in 'Undecided' was that notion that I was carrying about what education could do for young people based on my U. of C. experience…Just based on my naiveté and everything else, the way I saw that happening was basically in high schools. They were ripest for transformation. That's where I came up with the notion: Well, if I were a high school principal than I could make [educational change] happen. (W.G. Spady, interview, June 13, 2010)

Spady, at that time, saw the "high school principal" as a premier facilitator of change in

those institutions "ripest for transformation." Spady wanted to be an agent of educational

change, change that transformed complex institutions. In 1963, Spady entered the

Master's program in Education at Chicago to acquire the credentials needed to become a

high school administrator.

Early in his graduate career, Spady took a course with Charles Bidwell, another eminent sociologist, who became Spady's mentor and friend. Spady described Bidwell's demeanor and teaching style:

> Bidwell was just so intellectually powerful and incisive. He used a discussion method a lot. He didn't stand and talk. It was like: Okay, let's penetrate into this. What do you think? What do you think? He intimidated almost everybody. I called him Hetero-Multi-Polysyllabic Charlie. I mean, he would start to talk, and it was like: Oh, my God, what did he say? I just figured: Man, anybody this smart I better get as smart as he was. I better be willing to figure this out and go with him. Everybody else just ran. He just was over their heads. (W.G. Spady, interview, June 13, 2010)

Spady admitted that he began to read "tons and tons and tons of all this literature on Higher Ed. and all these theories about Higher Ed. cultures and all this stuff, just volumes of stuff." Spady wanted to "get as smart" as Bidwell when "everybody else just ran." Rather than be intimidated, Spady labored hard to get up to Bidwell's speed.

During this time, Spady worked for the University of Chicago's Office of Admissions while pursuing an M.A. He started connecting the data gleaned in the Office of Admissions to his studies in Bidwell's classroom:

> We were looking at the research that existed at the time on school cultures, high school cultures, and university cultures. I just looked at this stuff, and it's like: Well, this isn't what that means. This is what that means. How could this variable be based on that when it says something else? It was kind of a straightforward face validity understanding of things. I just suddenly had such a knack for framing issues [and] looking at problems. (W.G. Spady, interview, June 13, 2010)

Using his new-found "knack for framing issues," Spady worked closely with his mentor, Charles Bidwell, to design a study using data from Milwaukie High comparing athletes who transferred to college with students who did not:

I don't know where this all came from, but it just all started to make sense. It was literally toward the end of [Bidwell's] course in the summer that I designed the questionnaire that led to doing the study that was my Master's thesis and [later] became the "Lament for the Letterman" paper. (W.G. Spady, interview June 13, 2010)

In "Lament for the Letterman" (1970, January), Spady claimed that the athletes who saw athletics as a more serious means of social mobilization, rather than merely as a club to get invited to parties, were more likely to transfer to college and succeed in their studies.

Spady shared a story recalling the day he realized that somehow "Lament for the Letterman" had become a staple in the field of the sociology of sports:

When I was on the faculty at OISE (Ontario Institute of Studies in Education) and had been there a couple years, it may have been sometime around the winter or spring of '71; one of the guys in our department was all involved in this sociology of sports stuff. He wasn't around very much, didn't get to know him very well, but he sort of announced: They're holding their national conference over in Syracuse or Rochester or one of those northern New York towns, and I'm going over. You might be very interested. I decided, okay, I'll go to this thing.

I got over there and discovered I was a legend in the field because of this ["Lament"] paper. I didn't know any of these people. I didn't know about this field. I'm being treated like a celebrity, a guy who sort of staggers in the door who is wondering what's going on. Oh, my God, you're Spady, and, oh, gee whiz! This paper had become just a mainstay in their literature, I guess. (W.G. Spady, interview, June 13, 2010)

This recollection was the first instance that Spady shared where he stumbled upon an unexpected accolade involving his scholarship or work. More unexpected accolades would be forthcoming during his life, including the phone call in 1997 telling Spady that South Africa had adopted the curriculum he developed.

Spady used some of the data from "Lament" to write his M.A. thesis *Social Class and High School Status: Effects on the Aspirations of High School Seniors* in 1964. Also in 1964, Bidwell recommended Spady for a Doctoral Fellowship. Spady accepted the

fellowship to concentrate on the sociology of education. He was most interested in

"looking for pockets of subcultures" at the University of Chicago. One of his early studies

focused on a friendship network that consisted of a subculture of girls. Spady found that

this friendship network's "values were all very different from the main dominant thing" at

Chicago, and he saw that the entire group left the college after their first year.

Spady claimed that most people characterized the University of Chicago as a

"monolithic culture." Although Spady believed that "there were absolutely dominant

social norms, cultural beliefs, ways of functioning, [and a] political climate that

overwhelmingly characterized the place," that:

> There were still pockets of people [who] created their own friendships. This
> wasn't like a UIC (University of Illinois/Chicago) where you got thousands and
> billions of people roaming all over and people who go back home at night. This
> was a residential undergraduate campus where you had lots and lots of things
> going on with the same people all the time… It's not typical of heterogeneous
> American society. That's one of the reasons I was interested. Why do we have
> such a high drop-out rate? Is it that this culture is in some way or other just too
> incompatible for some people to handle? (W.G. Spady, interview, June 13, 2010)

Spady became influenced by Emile Durkheim's theory of suicides that claimed that

suicides were unable to integrate with the dominant culture. He saw a correlation with the

difficulty seen in student subcultures integrating into the University of Chicago's

dominant culture. Spady continued to mine data in the Office of Admissions to look at

student access and retention. He also met his first wife, Lee Wilborn at Chicago. She was

working as an administrative assistant for Bert Masia, one of the creators with Benjamin

Bloom and others of what would be called Bloom's Taxonomy.

Spady's work received a major boost as a result of census data that Jim Davis brought to class one day. Spady looked at a data set that at first seemed routine to him and absolutely linear: The people with higher socioeconomic indicators tended to have higher educational aspirations and attainments, and with a reduction in socioeconomic status, one's educational aspirations and attainments lessened.

Spady claimed that Davis had a great talent for mining a set. From Davis, Spady learned to pick the data apart, to look at it inside and out to see what may emerge. Spady found that what the data said was "more complex and sophisticated" than he first had thought. There was a reversal in the linear relationships between "socioeconomic indicators and both educational aspirations and attainments" when one got to the lowest of the low socioeconomic status:

> I found this major paradox in the pattern of how all these factors worked because you could bet your bottom dollar, as people say, that you could find totally linear relationships between any number of socioeconomic indicators and both educational aspirations and attainments depending on this, depending on that, just linear, linear, linear. And, wham! There was this reversal in these data, and I spotted it. I said: Look at this! This absolutely runs counter to everything…They said: Well, that's worth writing up. I developed these tables and I showed them to Bidwell. I pointed this out.
>
> Then I was getting invited to go to people's classes and present this data because it was like the latest, latest hot stuff right off the whatever. It's like by accident…If you got to college, what were the chances that you finished, okay? In all these cases, if you got there, the chances of your finishing were higher for the higher socioeconomic people. As you went down, the chances of finishing got lower and lower and lower till you got to the very bottom one. The very bottom one [was] low socioeconomic. It may have even been blacks. If you got there, your chances of finishing were higher than [the middle groups]. That was the paradox! It's only if you computed the conditional probabilities, which nobody did because they were all looking at the aggregate probability. So if you got there, what were the chances that you finished? Woonk! It went way up for that group. That's what I was pointing out in this re-analysis of all this. (W.G. Spady, interview, June 13, 2010)

Ironically, Spady found that those on the lowest end of the socioeconomic scale, the poorest of the poor, had higher educational aspirations and rates of success than those in the middle groups. These findings appeared in Spady's paper "Educational Mobility and Access: Growth and Paradoxes" that appeared in the *American Journal of Sociology* in November of 1967.

Spady's knack for mining data and his fondness for Emile Durkheim's theory of suicides led to Spady's dissertation, *Peer Integration and Academic Success: The Dropout Process among Chicago Freshmen*, in 1967. Spady's dissertation became the basis for later work by Vincent Tinto and others to explain first year attrition in higher education. According to Spady, those who had difficulty integrating into the dominant culture, like the subculture of girls in his earlier study, were more likely to leave Chicago than those who were socially integrated. Tinto credited Spady, but Spady was still nettled by the appropriation:

> There is a very touchy and embarrassing story related to my dissertation and to that first paper. A fellow named Vince Tinto basically took my theoretical model, put his name on it, and did some kind of study of dropouts, and named it the Tinto model. How he did that, I don't know. I mean, I didn't, what, protest? I didn't scream 'plagiarism' or whatever one screams. It's just like all of a sudden he was out there writing articles about the Tinto model, and it was my model… The only time I saw him do presentations of this, and the only time I ever saw it it was called the Tinto model…All I know is that Tinto was only the first of where I literally saw my work up on the screen, and somebody else had put their name on it. Just like: This looks awfully familiar…It's not the first and the last time that I have been borrowed from.
>
> It was just kind of a shock…I just used the concept 'social integration.' I certainly gave all full credit to Mr. Durkheim for having coined that concept. It wasn't that I was claiming anything new as I was trying to see if that helped explain the dilemma in Chicago…That's a closed chapter. (W.G. Spady, interview, June 13, 2010)

If imitation was a form of flattery and an accolade was some sort of expression of favor, then another unexpected accolade was bestowed on Spady with Tinto's borrowings. Spady was visibly upset when he related this story; however, Spady never approached Tinto or complained to him although he did share this story with Bidwell who told him to expect more such behavior from others in academia in the future. In 1967, Spady was awarded a Ph.D. in Sociology at Chicago, and he accepted an appointment in the Graduate School of Education at Harvard.

CHAPTER THREE

THE HARVARD YEARS AND THEIR AFTERMATH

At Harvard

Bidwell sent unsolicited recommendations to the faculty in the Sociology of

Education program at Harvard to hire Spady after the awarding of his doctorate at the

University of Chicago. Spady never saw the letters, but he knew that Bidwell was sending

his prized student to one of the most prestigious sociology programs in the U.S. In 1967,

the Sociology of Education program at Harvard included such scholars as Neal Gross,

David Reisman, Christopher Jencks, Nathan Glazer, Daniel Patrick Moynihan, Robert

Dreeben, and Theodore Sizer. When Spady arrived, Neal Gross was the Chairman of the

Sociology of Education program. Nancy St. John split her time between teaching in the

program and teaching in the Department of Educational Administration at Harvard. The

Sociology of Education program boasted celebrity professors, but Spady called it "this

small, little thing."

On his initial two day visit, Spady was required to meet each professor and give a

speech about himself and his academic interests. However, the department had already

made their decision and decided to hire him, giving him a five year appointment. He was

immediately befriended by David Reisman, co-author with Glazer of *The Lonely Crowd*

and co-author with Christopher Jenks of *The Academic Revolution*. Spady remembered

his first meeting with Reisman:

> I clearly knew who he was. I knew that he was sort of inner-directed, other-directed… He showed me around and he made sure of this and that. It was like he was given the assignment maybe from the Social Relations [department] to take care of this guy. My wife and I had to go back and find a house to stay in. We stayed at [Reisman's] house while we were house hunting. He just adopted me, absolutely adopted me. (W.G. Spady, interview, June 13, 2010)

Reisman also introduced Spady to his new colleagues.

During Spady's first month, Reisman and the others in the program, most

especially Daniel Patrick Moynihan, were driven by James Coleman's 1966 report *The*

Equality of Educational Opportunities Study. The controversy engendered by the report

about the effects of socioeconomic status on individuals and society permeated the field

of sociology of education. Theodore Sizer, author of *Horace's Compromise*, organized a

symposium around the Coleman Report and around issues of access and educational

opportunity. Spady was inspired by the presentations and the scholarship

> That was '67. That created a first level shift for me about: Maybe I really need to step into this arena because I was into all of this social class effects on everything [or] racial effects on everything. That moved me from [the quantitative] to [the qualitative] in some of my orientation. That was a biggie. (W.G. Spady, interview, June 13, 2010)

Little by little, Spady was shifting from an interest in quantitative research to an interest

in qualitative research.

Regarding the Coleman Report, for Spady, race itself was not a priority although

"it was an inevitable and inherent part of that whole issue." Spady saw the Coleman

Report as the first study that explicitly asked a question that had not been asked by a

major study before: "Is anybody learning anything?" This pre-dated the assessment movement of the late 1980s and early 1990s. Spady was also fascinated by the fact that the Coleman Report was the first well-known study to use sophisticated computers "to handle massive data sets and sort out the variables." According to Spady:

> If we hadn't had a major evolution in computers at that very time, they could have never pulled this off in terms of being able to do all the simultaneous equation stuff they were doing to parcel out these effects of these different variables. (W.G. Spady, interview, June 13, 2010)

At the same time, Reisman and Jencks were accumulating data for *The Academic Revolution*. Spady shared his "Educational Mobility and Access: Growth and Paradoxes" with the co-authors. He showed Reisman and Jencks the census data he gathered to prove his paradox: that those students in the lowest of the low socioeconomic sector had higher educational aspirations and attainments than those in the middle groups. Spady claimed that because his findings ran "counter" to their "grand theory" the co-authors actually changed some of the text in their interpretive chapter. Laughing, Spady called himself "another footnote in history" for his effort in their behalf.

Spady shared a story about "a very candid and touchy second year at Harvard." This was just before the student strike in the spring of 1969. During this tumultuous time, Spady's department was also going through a series of changes that would transform it for good.

There had been a "wave" of entering doctoral students, Spady was teaching several classes and serving on various dissertation committees. At the time, Neal Gross was still the Chair of the department. Robert Dreeben was told that he would not be

tenured. He was soon hired by the University of Chicago, so he was preparing to leave

after the end of the spring semester. Nancy St. John was splitting her duties between the

Department of the Sociology of Education and the Department of Educational

Administration. And, she wasn't even teaching at that time. According to Spady, in the

midst of the student turmoil, what he later referred to as "the war" happened in his

department.

Reisman had a strong connection with Nathan Glazer, his co-author for *The

Lonely Crowd*. Glazer was recently hired as a visiting professor for a year from Berkeley.

The students began attending his seminars, and within weeks they came "pouring" into

Spady's office complaining about Glazer's teaching, claiming that they were "learning

nothing" and "doing nothing," that "nothing [was] happening." They implored Spady to

take over the course:

> It's like: God, I don't know because I can't teach that. I already had an extra
> course. I volunteered and taught an extra course with my buddy, Chaim Adler,
> from Israel…There's Nathan Glazer sitting there presumably carrying some of our
> course load, and I looked into the class one day. He's got the door open, and he's
> sitting there. He's got the morning paper open, and he says to the students: Well,
> let's see what's in today's paper. This was not exactly the Charles Bidwell that I
> was familiar with! I just witnessed this thing as I cruise by the door. The students
> [were] absolutely up in arms. (W.G. Spady, interview, June 13, 2010)

For Spady, Glazer represented the antithesis of what he expected from a professor

teaching a graduate course, especially at a prestigious institution. Spady saw him as an

ineffective educator, a poor colleague, and, worst of all for Spady, lazy.

During this time, without Spady's knowledge, Gross, the Chair, had been in a

power struggle with Reisman. Gross did not want Glazer; Reisman did. Suddenly, Gross

was offered the Deanship at the University of Pennsylvania. He accepted, and one week

later he was at Penn. He left in the middle of the semester. Spady remembered:

> I'm sitting there and starting to do the arithmetic. Dreeben is going to be gone.
> Neal is gone. Nancy St. John is not very helpful. She's a very nice lady, and she
> really likes me, but so what? Then, I've got this Glazer. Shit, he's useless. (W.G.
> Spady, interview, June 13, 2010)

Spady was serving on the graduate admissions committee, and the committee had 22

doctoral students to supervise and guide through their studies. Spady approached

Theodore Sizer, then Dean of Education at Harvard.

Spady asked Sizer for help, explaining that Gross had gone to Penn, Dreeben was

leaving for the University of Chicago, and St. John's appointment was actually in the

Department of Educational Administration rather than the Sociology of Education

program. He told Sizer that he needed to hire someone, and Spady could provide a list of

"outstanding people" to choose from if Sizer wished. Spady recalled the meeting:

> Sizer says-- this is word for word: 'But, you have Nathan Glazer!' As one of my
> friends used to say, I didn't go to charm school. I said: Nathan Glazer! He's
> absolutely useless! Sizer did not want to hear this…I said: He's absolutely
> useless! The students hate him. He's not doing anything. They're not learning
> anything. I need somebody who is really going to do this. He says: Well, if you
> want to discuss the future of the Sociology of Education program, you need to talk
> to Professor Moynihan…This is the famous David Patrick Moynihan, the senator
> from New York…He said: You have to talk to Professor Moynihan. (W.G. Spady,
> interview, June 13, 2010)

According to Spady, during that time Moynihan had this "weird thing called the Urban

Study Institute." It was a research partnership between the Massachusetts Institute of

Technology (MIT) and Harvard. Moynihan was splitting his time between the two

institutions supervising a large national research project on urban policy. Spady provided

some context for the project and his relationship with Moynihan:

> This is back when everybody was first trying to decide: Should there be welfare or
> not welfare anymore, and what about the poor in the cities? He had done some
> stuff on that…He was Mr. Policy, presumably. I said: Moynihan? He's never even
> met me…which was true. The guy wouldn't know me from the man in the moon,
> and he's going to tell me about whatever. (W.G. Spady, interview, June 13, 2010)

Spady decided not to approach Moynihan about the future of the program or anything

else.

Just before the onset of the departmental war, Spady had attended the American

Educational Research Association's (AERA) national conference in early March of 1969

where he met representatives from the Ontario Institute for Studies in Education (OISE)

in Toronto. The OISE representatives offered Spady a "gigantic salary increase" and "an

associate professorship after two years." Spady told them that he had a five year

appointment at Harvard with three years remaining. However, because of the "war" and

after Spady's discussion with Sizer about Moynihan, Spady realized that he was in a "no-

win situation." Spady met the representatives from OISE again and accepted their offer.

However, it was late spring or early summer during admissions at Harvard, and

the program had scholarships and fellowships to award students who applied to the

Sociology of Education program. Spady told the esteemed Chair of the graduate

admissions committee about the changes taking place in the program. He recalled telling

the chair:

> I have 22 students. I've got no help!…We've got a real dilemma here because not
> only are none of these people going to be around, but I'm not going to be around
> and we cannot admit students to a program that does not exist. Who is going to

teach them? We cannot in good conscience--it doesn't matter how good these students are--we cannot admit them to this program. The famous professor totally agreed. Everybody else totally agreed, and we agreed we would send a memo to the Dean…basically saying we have a serious problem. We cannot admit people to a program that does not exist [and] has no faculty. (W.G. Spady, interview, June 13, 2010)

The Dean disagreed with Spady and the Chair of the committee. Sizer had what Spady

called "deanlets" working for him. They were assistants who would monitor committee

meetings. According to Spady, one of the "deanlets" burst into a committee meeting and

screamed at the top of his lungs at the professors: "You will admit these students to this

program! The Dean insists on it! There are no excuses!" The committee admitted five

students to the Sociology of Education program, awarding them scholarships, with Sizer

and the others knowing that the program would soon be disbanded. Letters were sent to

the new students in late August saying: "Dear students: don't come. There's no program."

Spady was livid recounting the episode:

When it's too late --It's too late for them to do anything! This is integrity? They created a new program with Christopher Jencks and David Cohen; Moynihan was some titular something. Nathan Glazer called it Educational Policy Studies, and disbanded the Soc. Ed. Program. My 22 friends and students all had to scramble desperately to find dissertation chairmen and learn things and write dissertations and finish…I was beyond appalled because the bonds we had and the connections and how we were really all trying to support each other was just first rate. It's like it doesn't matter because the politicos had something else in mind. They have an Educational Policy Studies program now, I guess. They've had it for centuries, and our whole program disappeared. (W.G. Spady, interview, June 13, 2010)

Spady did not see it coming. He didn't know anything was afoot until he was pleading

Sizer for help, realizing then that Moynihan, Spady's friend Reisman, and Glazer, were

engineering this change with Sizer to have David Cohen and Christopher Jencks move in

and start this new program because Cohen was part of Moynihan's Urban Study Institute.

Spady found their actions unforgivable because of the students affected:

> They would not admit that there was not going to be a program. They admitted
> these people that planned their life around it, and then they pulled the rug out from
> under these five students with them having no recourse. I was disturbed about our
> current students, but the way they handled the incoming situation was just
> unconscionable. The other faculty on the committee knew that. They knew we
> shouldn't be admitting these people. So, it was a very volatile, difficult,
> problematic year; *and* I performed at Carnegie Hall that spring! (W.G. Spady,
> interview, June 13, 2010)

Spady left Harvard just before the Sociology of Education program was dissolved and

became the Department of Educational Policy Studies, *and* he played trumpet on the stage

of Carnegie Hall.

In 1969, Spady toured with the Harvard-Radcliffe Orchestra which consisted of

talented musicians from Harvard, Radcliffe, MIT, New England Conservatory,

Northeastern, and Lesley College. One of the stops on the tour was New York City's

Carnegie Hall. Spady sat in the brass section with a doctoral student in physics named

Charlie from MIT who was first chair trumpet. Many years later, Spady attended a

concert in Denver by the Boston Symphony Orchestra. The orchestra entered and was

seated, and Spady recognized Charlie:

> Charlie sits down in the first horn seat. I grab the program. I look, and I said:
> That's Charlie! What's he doing here?! I thought he was a Physics major. He's now
> first chair at the Boston Symphony, and I'm saying: He doesn't belong here!
> What's he doing here? He *was* an MIT physicist. He did a walk-on and
> auditioned, and got the first chair job at the Boston Symphony…Here is this guy
> who was an MIT physicist who decides: Hell, I'm going to try out, and he's the
> first chair in the Boston Symphony! (W.G. Spady, interview, June 13, 2010)

Ironically, Charlie took the opposite career trajectory that Spady traveled. Charles

Kavalovski, a tenured professor at MIT at the age of 35, went from being an academic to

a professional classical musician and principal horn in a major orchestra. However, Spady

exhibited little regret about not pursuing music as a profession.

After Harvard

Spady left Harvard to accept an appointment at the Ontario Institute for Studies in

Education (OISE) in 1970. At that time, according to Spady, much of the research

methodology in sociology hinged on learning how to work with computers and statistics

and generating a good variable. However, Spady was becoming even more interested in

qualitative rather than quantitative research. He asked himself the question: "How do you

really generate some good information in the first place?" The rest of it for him was "no

more than eighth grade arithmetic." He would tell his students at OISE who took his

research methodology courses: "If you know that the number nine is bigger than the

number seven, I can teach you how to do this."

At OISE, Spady revived a "fine art" taught to him by Jim Davis and Bidwell at

Chicago: the fourfold table. He recalled:

> I could create typologies and four fold tables for anything. Throw an issue out
> there and in two seconds I had a fourfold table for it to sort out: Are you talking
> about this part of it or that part of it or the combination? What is it? (W.G. Spady,
> interview, June 13, 2010)

Spady remembered a sociological/organizational theory course at Chicago taught by Peter

Blau. In Blau's course, Spady became familiar with Max Weber's typology of forms of

authority in organization and his tripartite concept. Spady explained Weber's typology:

[Weber] had the charismatic. He had traditional, and he had rational/legal. I just looked at it. Rational/legal was his explanation for bureaucratic. I just looked at it, and I said: But, rational and legal are two different things. I mean, hello! They're two different things. So, I fashioned this fourfold table out of-- here are these four different modes of authority and how they apply in classrooms. (W.G. Spady, interview, June 13, 2010)

Spady modified Weber's typology of forms of authority in organizations to apply to teachers and their teaching personalities.

For Spady, "legal happened when teachers went: Well, these are the rules!" These were the teachers who depended on the "legitimacy of the role itself." If the bifurcation between the teacher as authority and the students as objects of authority would vanish, these teachers would lose their "personal legitimacy." The teacher who depended on the authority of the role was the antithesis of Spady's beloved high school teachers, George Bouthilet and Jack Cruikshank. Bouthilet and Cruikshank were high charismatic and high on the rational scale. Spady considered them to be engaging experts.

Spady claimed that he got "great mileage" out of his take on Weber's typology when he was at OISE. He taught this in his classes, and it became a prototype for some of the work that OISE graduate students were doing on improving teacher education. This resulted in Spady's influential article "Authority, Conflict, and Teacher Effectiveness" which appeared in the *Educational Researcher* in January of 1973. Spady told of another borrowing of his work:

Low and behold, a few years later this very eminent University of Chicago professor in this major new book, the revolutionary book of the whole universe, has it in one of his chapters with no attribution to me. And, he had gotten it off of my work. So, he preceded Tinto in terms of borrowing liberally. (W.G. Spady, interview, June 13, 2010)

The "very eminent University of Chicago professor" was Robert Havighurst, who was

commissioned in the early 1960s to do a groundbreaking evaluative study of the Chicago

Public Schools by Mayor Richard J. Daley. Spady recalled another instance of an

unexpected accolade:

> So Havighurst, I don't know; maybe he co-authored [the book] with somebody.
> Anyway, they put out this book, and there is my typology. I'm like: Okay. I
> showed this to Bidwell. Just like nobody knew what do about this. This was years
> later because I didn't write about [Weber] until I got to OISE. I may have put this
> little framework on the blackboard at Harvard, but it wasn't until I wrote a paper
> about it, and I was being invited to go to school districts and give lectures up in
> Canada and was using it. That's when I kind of got hooked on that framework, and
> that's when some of those papers got written. (W.G. Spady, interview, June 13,
> 2010)

In 1970, Spady joined the American Educational Research Association (AERA).

A notice went to members about the need of creating a division in AERA around the

social sciences other than psychology. Spady met with Bidwell, Frank Besag, Hank

Levin, and others to form a division dedicated to the "social context of education." They

created Division G around the sociology of education. Bidwell was elected the first

president of Division G which meant he also served as a vice-president of AERA. Levin

was the second president of Division G and a vice-president of AERA. Spady served as

Division G's third president, and he was also a vice-president of AERA.

Spady created and edited the Division G newsletter: *The Generator*. He published

research articles authored by researchers from throughout AERA in the newsletter, and he

became well-known to the entire AERA membership. At that time, AERA decided to

publish a series of annual research volumes. Spady was appointed to the editorial

committee and was assigned to write an article on the effects of social class and race on

education. Fred Kerlinger was the editor of *The Review of Research in Education* that

included Spady's 1973 contribution "The Impact of School Resources on Students."

Spady "dropped out" of AERA in the middle to late 1980s:

> I just stopped going. It was just: Division G became the Hispanic advocacy
> division. The actual social sciences nature of the work just completely vanished.
> My work was more and more about shifting the entire paradigm of how education
> is constructed. I saw all the research doing nothing but reinforcing the existing
> paradigm. There was no intellectual academic home for me that I recognized
> rightly or wrongly. I just absolutely didn't find it in the AERA. (W.G. Spady,
> interview, June 13, 2010)

By the 1980s, Spady had been working on his curricular innovations and was no longer

connected to the work at AERA.

In 1973, Spady was becoming more and more dissatisfied with OISE and the

activities outside of the classroom expected of a college teacher:

> I was sick and tired of committee meetings and wasting my time protecting
> incompetent people… I love teaching. I love my students. I had very, very loyal
> and wonderful students. There was just a lot of very challenging and interesting
> things we were doing. Toronto was an okay place to live in, except winter went
> forever, which I could have done without, but I wanted to get back to the States. I
> wanted to get back into really making a difference. (W.G. Spady, interview, June
> 13, 2010)

For Spady, making a difference meant moving to Washington where he could take a

national stage. He left OISE in the middle of the 1973 academic year to work for the

National Institute of Education in Washington D.C.

From Mastery Learning

After OISE, Spady worked for the National Institute of Education in Washington

D.C. from 1973-1979. During that time, he started his work with James Block and

Benjamin Bloom in the field of mastery learning. In his second year at Harvard, Spady

visited Block at his mother's house in Oregon during the Christmas holiday. They had a

conversation where Block showed Spady the work that he had been doing with Bloom,

based on John Carroll's theory that "aptitude is rate of learning" not the ability to learn.

Block boasted that he and Bloom were "going to take American education by storm."

Spady remembered the conversation with Block:

> 'We're going to take American education by storm,' exact quote. All this stuff flashed for me. I didn't quite say it this way, but I almost did. You remember the Johnnie Carson/Ed McMahon shtick they had going all the time? He would say: Wrong, Yak Breath. Well, I said: Wrong, Mastery Breath. You're not going to take anything by storm because--this is where I sort of declared spontaneously: Spady's first law of education--the certification system drives the instructional system! (W.G. Spady, interview, June 13, 2010)

Block and Bloom were attempting to "restructure the instructional system, but the

certification system" required a certain number of grading periods, and the students were

graded in ink. The students could not adjust their own rate of learning and the learning

event wasn't flexible.

Out of this flowed one of Spady's maxims about education in the U.S.: "When you

run out of time, you run out of opportunity." For Spady, the Carnegie unit actually drove

the system, not learning. Spady believed that until the system jettisoned a "time-based

credential," there was no chance of implementing "a non-time based instructional model."

For Spady, the shift for him from the sociology of education to an interest in

curriculum and instruction occurred during his stint at OISE. He was moving away "from

all the number crunching stuff." For him, the teacher effectiveness fourfold table based on

the Weber typology was a move to an important question for Spady: "So what really are

the things affecting effectiveness?" He was also very much influenced by Carroll's

definition of aptitude as rate of learning. Spady asked himself: "What about giving kids a

second chance? Why is all grading in ink?" He didn't really formulate anything about

curriculum and instruction until Block invited Spady to join a mastery learning panel at

the AERA meeting in 1973 that included Levin where Spady discussed the social

implications of mastery learning:

> Even though I was very motivated by what Jim had revealed to me in '68 about the
> work he was doing with Bloom, it's the first time I was pulled into organizing my
> thinking to address these issues. That was a gigantic catalyst because things that I
> had been carrying around in my head impressionistically I was forced to write
> about. That made me really systematically realize the whole system is screwed
> up…That was ground zero for me probably presenting the system change issues
> related to OBE that I remember ever presenting. [Jim] then produced [*Schools,
> Society, and Mastery Learning*] out of this…That was the launching pad…That
> was the pull into becoming more of a reformer. (W.G. Spady, interview, June 13,
> 2010).

Spady used his position at the National Institute of Education (NIE) to begin to promote

mastery learning which was a curriculum based on outcomes, what a student could

actually do as a result of instruction.

Spady claimed that the initial aspiration for NIE was that it would be an

educational policy counterpart to the National Institutes of Health. However, "politically

it was under attack in the Congress from the day it opened. It eventually got turned into

something else and renamed and all kinds of crap. It's all tucked into the Department of

Education." One year though, he was associated with the Institute of Public Affairs

helping the D.C. schools with their curriculum and facilitating instructional change driven

by an interest in mastery learning. NIE paid his salary. This work started the evolution

into what became Outcome-Based Education (OBE). Spady resigned from his position at

NIE in 1979.

Spady had developed "a pretty strong presentation" by 1979 around what OBE

was and why it was needed in U.S. schools. The American Association of School

Administrators (AASA) invited him to give a national presentation on OBE. Spady

recalled:

> It was a smash hit, and that gave me an identity with the top honchos in the
> association…When I went to AASA, their Executive Director was Gordon
> Cawelti who retired some time ago and their Director of Publications was this
> fellow, Ron Brandt… Brandt totally got what we were about, and it's why two or
> three of the major things I published in that late '80s, early '90s period was in their
> journal *Educational Leadership…* My scholar colleagues thought I was insane. I
> did [AASA] because I knew it would give me enormous visibility and leverage
> with school districts all over the country. I made the best of it for four years, and
> then it was time to go. (W.G. Spady, interview, June 14, 2010).

From 1979 until 1982, Spady served as the director of the National Center for the

Improvement of Learning at AASA.

As part of Spady's duties at AASA, he was assigned as the association's

representative to the National Council for the Accreditation of Teacher Education

(NCATE). The council consisted of various sponsoring organizations from three areas of

academia. The National Education Association (NEA) was extremely influential and held

one third of the votes on the NCATE council. Professors of education from institutions of

higher education had a third of the votes. Then, there was the so-called "Third World."

The Third World consisted of five or six educational organizations. Each had one

representative on the council and one vote each. AASA was one of those Third World

educational organizations. Spady was surprised about the make-up of NCATE: "I was

introduced to organizations that I didn't even know existed who all had single members

there also. It was like two-thirds of the vote were the establishment, and then one third

was these other related organizations." Spady attended his first NCATE meeting within a

few weeks of hire at AASA.

The NCATE council met in New Orleans in conjunction with site visits by the

council to some Louisiana school districts. Spady admitted that he "knew nothing in the

world about NCATE…nothing about their criteria…nothing about anything." Prior to the

NCATE council meeting, he received in the mail six or seven reports that his council sub-

committee was supposed to evaluate:

> I thought: evaluate and act on rather than rubber stamp. I go to this first meeting.
> I've got my six or seven or eight cases, and all it is is a list of criteria and a thing
> that says: met, met, met, met. There's no evidence. There's nothing. I mean, there's
> just nothing. It's like: take a piece of paper and put almost nothing on it, and then
> say: Okay, please endorse this. Well, I bogged their whole process down because
> one of them happened to be an institution I knew about. I happened to know about
> the inner politics. I knew about this and that. This happened just accidentally, and
> I'm sitting there saying: How can we pass this when I know that da, da, da, da, da
> is true? Okay? I mean recent evidence. (W.G. Spady, interview, June 15, 2010)

Spady's first NCATE council meeting ground on for "hours and hours," and his sub-

committee ordered in food while laboriously poring over the evidentiary documents while

the other council sub-committees were "done in like ten minutes." Spady refused to "see

any justification" for not only passing the questionable institution that he was familiar

with, but any of the other institutions that were a part of the sub-committees case-load:

"There was no substance for us to work with. It was just a checklist: met, met, met, met.

Everybody was meeting everything! It's all changed because of me, I'm told."

The fact that he bogged the process down caused "enormous distress" to the rest of the council members as well as the administration of NCATE. The members and administrators would send out committees that would generate the reports, and then, the council would rubber stamp their committees' reports without study. Spady was accustomed to seeing evidence.

At the second meeting, the same thing occurred. Spady asked for documentation. Regarding one program pending re-accreditation of its teacher education, the only sort of documentation Spady saw to support the program's re-accreditation was that the program had "all these books in the library." Spady asked the council members: "What is it that says that their students can do anything or that their students are effective at anything? I started talking outcomes. Well, harrumph, and, oh, my God, we just don't deal with that!"

By the third meeting, Spady said that he was "rabid." The NCATE meeting was held in Washington, D.C., and Spady went out to lunch by himself and bought the latest issue of *Newsweek* magazine. The front cover blared: "Education Failing All over the Country!" He returned to the NCATE meeting after lunch and did his "mad dog thing":

> We have no evidence! We are gathering no evidence that the graduates of all these places that pass all this stuff--everybody always passes! If everybody passes and all their graduates are wonderful, then why do we have this? And I throw this *Newsweek* magazine down on the table. Everybody is failing! Whether that was true or not didn't matter. (W.G. Spady, interview, June 15, 2010)

After his harangue, Spady finally "got them focused on outcomes." He insisted that they add criteria that would address the "actual effectiveness of the graduates." Spady was not interested in whether the graduates passed any courses. He wanted indicators that they could actually do something in their "performance roles."

After the fourth NCATE council meeting, Spady approached his boss at AASA, Paul Salmon. Spady "blew up" in frustration. He told Salmon that the entire NCATE process was "insane" and a waste of his and everyone else's time. Salmon told Spady that he would find a new AASA representative to the NCATE council, that there were "all kinds of members who would love to sit on the council." Spady was happy because he didn't have to go anymore.

About a year later, at another conference, although Spady believed it to be for the Association for Supervision and Curriculum Development (ASCD), he encountered a woman who had sat on the NCATE council with him. He recalled her as Martha. She was a representative from a teacher training institution. She said to Spady: "'You have no idea how you've changed that organization!'" Spady was flabbergasted. NCATE had fired the executive director. There were new criteria about outcomes. They changed everything in the intervening year or year and a half after Spady quit. According to Spady:

> It turn[ed] out that my high powered, very intellectual, very intelligent buddy, Arthur Wise, became their executive director, U. of C. graduate, a guy who graduated the same year I did. His dissertation won the best dissertation in the universe award, and mine came this far behind. He was at NIE with me. We knew each other. He became their associate director. Well, man, that was a gigantic change from where they were!
> It shifted out of being a kind of ritualistic be-sure-you-go-through-the-motions-and-give- them-the-right-paperwork-to-make-it-look-good-on-paper to something that has apparently much more teeth and much more rigor and much more whatever. I didn't know because I have paid no attention to it ever since the day I left. (W.G. Spady, interview, June 15, 2010)

Spady knew he was on the right track by championing accountability and favoring outcomes and performance indicators. The NCATE experience provided proof of that.

From his base at AASA, he had the leverage to build an organization called the
Network for Outcome-Based Schools. This helped to propel his first version of Outcome-
Based Education (OBE). The Network for Outcome-Based Schools got created in the
1979-80 school year. The group held its initial meeting in a "dingy motel up near O'Hare
Field" in Chicago. The Superintendent of Schools in Johnson City, New York named
John Champlin spearheaded the group. The other mover and shaker at the first meeting
was Lorin Anderson, a former student of Bloom at the University of Chicago and a
professor at the University of South Carolina. Spady didn't recall if Jim Block was at that
meeting.

They wrote a "philosophy document" and formalized their approach at a second
meeting in the Denver area because a superintendent of a suburban area north of Denver
called Thornton was also a champion of OBE. Spady said that he had "this natural
communication base nationally via AASA and could influence what went onto the
national conference program." Spady also created a summer instructional conference on
OBE for teachers and administrators. He brought in top educators "doing educational
change [and] instructional stuff" to present at these events.

Spady resigned from AASA at the end of 1982, and he drove cross country during
Christmas vacation to establish life in California at the start of 1983. When he arrived in
California, on his front step was a copy of Peters and Waterman's book, *In Search of
Excellence*, left by a friend who he had met at AERA in 1978 or 1979, Sue McKibbon.
She had disappeared off Spady's "radar screen," but she then became Waterman's
research assistant when he and Peters wrote *In Search of Excellence*.

Spady "absolutely devoured" *In Search of Excellence*. However, he believed that

if he reorganized the book, and reconstituted their eight labels of organizational

excellence, "it would be a way better book." Spady wrote an article that applied and

expanded some of Peters and Waterman's tenets built around management theory to

apply to education. Terry Deal edited a special edition on educational change for the

Peabody Journal of Education at Vanderbilt, and he said to Spady: "I want that paper."

 The paper was titled "The Emerging Paradigm of Organizational Excellence:

Success through Planned Adaptability." and it was published in the edition edited by

Deal: Spady remembered:

> Never heard a comment; never got a comment from a single soul on it. It's one of
> the best papers I've ever written, and it just got lost…It was what I made of their
> framework, how I recast their whole thing into those eight other things. I should
> have really mined that much more deeply…
>   By the way, I live a life of: There are no regrets. Everything you choose to
> do, you choose to do. If there *is* a regret list, that's on it, that I didn't do more with
> the concepts and the framework that I put in that paper. The fact that I just let that
> one paper disappear out there in journal land and didn't really follow up and make
> much more of what I put into that paper is one of the--we could call it--strategic
> mistakes that I've made. I could have done much more with that. (W.G. Spady,
> interview, June 14, 2010).

For living a life of no regrets, Spady clearly regretted that he never received a comment

on the paper nor fleshed out the model. Spady's paper boiled down to his using the latest

thinking related to corporate organizational excellence to provide a means to guarantee

consistent quality in learning, a thing that drove his work in OBE.

In 1983, *A Nation at Risk* was published. Spady recalled that he gleefully "tore

that to shreds" in presentations at conferences. Additionally, in 1983, Spady's former

boss at AASA offered him a job as the Director of the Far West Laboratory. One of the

key people at Far West was a former student of Bidwell's who also recommended Spady.

The "last thing" Spady wanted at the time was a new job. He intended to work as an

independent consultant. However, it was a heady time for Spady, and the job was in a

convenient place:

> I lived in a little town called San Carlos which is halfway between San Francisco and San Jose on the peninsula just ten miles north of Stanford and then ended up buying a place in the Santa Cruz Mountains…It was perfect because I was just burning myself out flying all over the country from the West Coast, not exactly central.
>
> In that period, I'm stepping into a whole new position while having been the impetus behind this Network for Outcome-Based Schools. My thinking and work was evolving, and suddenly there was this whole Peters and Waterman thing to build off of: Okay, so if we really want excellence, folks! Then, *The Nation at Risk* comes out, and I'm all over that. It was just an extraordinarily busy, complex time. (W.G. Spady, interview, June 14, 2010)

Spady was named Director of the Far West Laboratory by the National Institute of

Education in 1983.

One of Spady's employees at Far West was "quite a risk taker named Lynn

Beckham." Beckham persuaded Spady to organize a national conference on excellence in

schools in 1984 that would serve as a critique of *The Nation at Risk* report while

introducing educators to Spady's brand of outcome-based education.

> We ended up doing that, and that is where I got all the heavy hitters involved. I had (John) Goodlad on the program. I had all these people. We reached out and pulled in all these all-stars, and in almost no time, in three months the thing got planned and pulled off in San Francisco. We had people from universities all over. This became just an event. At this banquet, we had Goodlad who basically said: Sitting next to me up here is somebody who pulled this whole thing off in three months, and this is a miracle. You see what we got here. You see what we've done here. He said: Who else could have done this? (W.G. Spady, interview, June 14, 2010)

Spady was beginning to generate a name for himself as well as more widespread interest

in OBE.

Spady believed that overall he had "wonderful" support from most of his staff at

Far West, but he saw a "major rift" developing between those staffers who supported the

1984 conference and "helped pull it off" and those who felt that the conference may have

been a waste of Far West's resources. There was some conflict at Far West between

these staffers, but Spady continued to move the OBE agenda further. In fact, he leveraged

his position at Far West to introduce OBE to school systems in Western states such as

Utah, Oklahoma, Oregon, and Arizona. Spady recalled:

> It was a time of enormous ferment, but remember I was still stuck in the
> educentric version of OBE because that's all there was. It was all about helping
> kids do better in the courses we're now teaching, so they can go to college…This
> was a very volatile period, and everything would have stayed totally educentric if I
> hadn't been pushing the envelope and just breaking the whole thing open. It
> would have just stayed mastery learning. (W.G. Spady, interview, June 14, 2010)

For Spady, "educentric" meant that he was basing things on the traditional educational

paradigm of transitioning students from K-12 to college to gain credentials without the

explicit interest in preparing students for life performance roles. According to Spady:

> Educentrism is closed system thinking. It is simply closed system thinking where
> the elements in the system are used to define the meaning of all the other elements
> in the system. So subjects and grade levels. Our school years, our semesters, our
> classrooms, our teachers versus students are this or are that because everything is
> defined by how everything else [already] is. (W.G. Spady, interview, June 14,
> 2010)

Spady's brand of educentrism would evaporate with the further evolution of OBE.

CHAPTER FOUR

OUTCOME-BASED EDUCATION

To Outcome-Based Education

While at Far West, Spady developed and began to popularize OBE. At the end of

1986, Spady was funded by the Danforth Foundation to create a network of OBE schools.

From 1986-1992, as founder and executive director of the Network for Outcome- Based

Schools, he expanded OBE to school systems in Illinois, Michigan, Iowa, California,

New York, and Connecticut. In 1992, Spady founded the High Success Network with Kit

Marshall and Chuck Schwahn to strengthen the OBE networks throughout the states.

Through the 1980s and into the early 1990s, Spady was actively employed as an OBE

consultant and a frequent presenter of OBE at conferences, many sponsored by the

Association for Supervision and Curriculum Development (ASCD) and the AASA.

Spady credited Bloom and Block with laying the groundwork for Spady's

curricular innovations. However, Spady believed that mastery learning was actually more

concerned with raising the levels of those who pass courses or transition to the next grade

rather than what the students could actually do as a result of instructional experiences.

According to Spady:

> They built this whole thing on mastery learning around the fact that if teachers did
> this, and if teachers did that, and if teachers raised expectations, they could get the
> vast majority of their kids passing and learning things at the 80% level rather than
> the conventional 70% level of most grading systems. This became religion. It's

like: Oh, my God, we've got everybody to 80%! (W.G. Spady, interview, June 13, 2010)

The break between the proponents of mastery learning and Spady came when Spady stood up at a national conference for OBE and mastery learning, and asked in a loud voice: "80% of what?!" The mastery learning teachers were focusing on raising pass levels 10%, but Spady wondered what the students were actually able to do as a result of instruction. Spady wanted to know if the 10% of what more occurred as the result of the learning event really mattered at all.

At that point, the OBE/mastery learning movement split into two separate camps between the mastery learning teachers who strived for the 80% passing level and those who wanted to know "what the kids can do."   Spady announced: "I am an advocate for substance: Give me the words, please. Don't give me a number. That doesn't mean anything!" Spady's outburst split the movement for good.

However, there were still competing notions about what OBE was and should be. Spady illustrated this disparity with a story. At one conference in the late 1980s, he was gathering his overheads after a presentation, and this man approached him. The man claimed that he was the "most outcome-based teacher" at his school. His claim rested on the fact that in his "class you get this many points for this and this many points for this and then homework." Spady told him a bit sarcastically: "That's great. Keep it up." The man walked away happy. Then a woman had to talk to Spady. She claimed that she was the "most outcome-based teacher" in her school. Unlike the man, she gave no points for homework. She gave no points for anything. That made her the most outcome-based

teacher. Spady had just witnessed two polar opposites built around OBE and the

obsession with grading. He asked himself: "What's the point of all these points? We're

just making it up, all right?"

He abandoned the "socioeconomic/status/number crunching stuff," a remnant

from his training in sociology, when he came to the realization that "we're just making it

up." There was no actual substance to the purported curricular reforms such as mastery

learning or even his early notions of OBE. Spady believed that it was all about grades

rather than substantial, demonstrable learning:

> It's grading that's running everything, not learning. It's grading that's running everything and credit, not the curriculum. The curriculum is whatever we can cram into this amount of time. I would stand in front of audiences way back in the whatever days and say: You know, 35 years ago today I was sitting in biology class, and biology class was 55 minutes a day, five days a week, for 40 weeks. And, you know, today every kid in America who is 15 is sitting in biology class, and biology class is 55 minutes a day, five days a week, for 40 weeks. The only difference is that there is ten times more biology today than there was 35 years ago, and it's still a time-based event! (W.G. Spady, interview, June 13, 2010)

For Spady, the ironic thing about education was that learning was actually a variable

while time was a constant.

Spady began to see learning in terms of Coleman's report on equality of education

and its emphasis on expanding educational opportunity. He was challenging "the

fundamental opportunity conditions in schools," and for him it all came down to time:

> I became this fanatic about [why] we have this time-based system not a learning-based [system], not an outcome-based [system], not a results-based [system]. Everything is based on how long it's supposed to last. Everything! Find me something that isn't defined that way. Nobody could. Nobody could…
>   Is opportunity how much time you sit there? Or, how much do you get to learn? And get credit for it. This all became a no brainer. The whole system is structured so that unless you're a fast learner you lose. Hello? Now, would

anybody care to do anything about that? No, because everything in the system is legally defined around how long it's supposed to last! (W.G. Spady, interview, June 13, 2010)

Spady believed that his mission was to blow "Friday out of the water," Friday being the traditional test or quiz day for K-12 classes.

He wanted to see the end of grading periods and the end of semesters. He felt that these were merely "arbitrary time blocks," and that these arbitrary time blocks were "running us, not the learning, not the kids." At OBE conferences, Spady would show an overhead presentation that asked attendees what were the three things that run schools. One of the overheads would show pictures of the teachers, the principals, and staff. Another overhead would show the secretaries, the janitors, and the bus drivers. The third overhead would show a schedule, a calendar, and a clock. Spady recalled the laughter: "They could only pick one, right? It's like, oh, shit, okay…the calendar!"

At presentations, Spady would ask the attendees to define a course. All of the hands would shoot in the air. Most of the attendees claimed that a course was a "body of knowledge." Spady believed that a course was not a body of knowledge. He defined a course as an "event" or series of events that led to a test. For him, school was about testing on Friday and getting an average of all the grades. Spady was doing everything he could to get schools to break out of the "time trap."

At the same time, he was questioning some of his own long-held assumptions. When he wrote the papers at the University of Chicago about educational aspirations and attainments, Spady assumed, like most of society, that if a student had any motivation or

any ability at all that going to college was the way to "manifest it." Spady saw college

like many people saw college:

> College was an end in itself. It was an end in itself, not just because it gave you a degree, but it basically was the validator of your motivation and your intelligence. College was the way to be on the life achievement track. You just simply did it because it would then take you to other life achievement things. (W.G. Spady, interview, June 13, 2010)

Spady claimed that a turning point in his career occurred in 1987, and it had to do with

this assumption about attending college. Spady read an article in the *San Francisco*

Chronicle ("Nathan Glazer was right; let's just see what's in the newspaper!"). The

headline caught his eye: "America's Top U Grads Failing in Today's Marketplace." Spady

said that he "went through a paradigm transformation right there at my kitchen table

reading that article." It changed everything for him about educational aspirations and

attainments: "It was such a jolt and such a shock."

> Someone had done a follow-up study of the valedictorians of the top 300

American universities. The researcher found that half of them were unemployed, and that

the other half were working at jobs that did not need much college preparation. According

to Spady, this half "kept their taxis very tidy." That was the line he used with his

audiences when he retold this story. He recalled his shock:

> It's like, holy shit. I have just spent the last decade helping teachers help their students be the best students they could possibly be. Here we have the 300 best students in the country, and they're unemployed. What's wrong with this picture? Maybe school doesn't translate into life success in a future that is different from the way school is. That changed everything. (W.G. Spady, interview, June 13, 2010)

After reading that article, Spady felt that he was in "deep trouble" because "that whole first wave of OBE stuff" was about trying to "help teachers help students be the best students they can possibly be" to prepare them to transition to college.

Spady questioned if this curriculum was preparing students for the future that they would actually face. That's when he started to develop an OBE curriculum that was "future-focused." However, to do this, he needed a template "to hang" things on, a template about "real performance." Fortunately, his background in sociology provided him the language of the concept of "life role." From life role, he could "derive down the notion of a role performer, somebody who is engaged in complex kinds of things over and over again in whatever life role they're in." Spady had changed his idea of what an outcome meant:

> What it did for me was [to transform] the notion of an outcome [meaning] doing well at the curriculum to you have to be able to do something after you're gone [from school]. I turned this into the concept called 'outcomes of significance.' The word 'significant' means what really matters in the long run. That became my definition. What really matters in the long run and the long run is after [the students are] gone, after it's over. (W.G. Spady, interview, June 13, 2010)

Spady presented this new version of OBE based on life performance roles and "outcomes of significance" at various national conferences built around OBE.

However, Spady was becoming frustrated with the other proponents of OBE. He recalled one presenter at a national conference who was a former student of Bloom's who gave a "clever and wonderful" speech about "all these wonderful things teachers can do." Spady thought the speech was "cute," but it didn't move the concept of OBE forward. The next year at the same conference the same presenter gave the exact same speech:

"word for word, gesture for gesture, joke for joke, nuance for nuance." Spady described

his reaction to this presenter: "When he got to the ever-so-clever part of his speech when

he says: And so on Thursday night when you're making up your test for Friday, be sure to

do the following things. I just lost it!" Spady was sitting in the audience among thousands

of conference attendees.

He jumped up and grabbed two or three colleagues who were part of his Arizona

OBE team. Spady asked: "How can it be outcome-based when you are deciding Thursday

night what should be in Friday's test? You should be telling them on [the preceding]

Monday!" Spady was livid. He shouted to his colleagues: "This is not OBE. This is just a

bunch of bullshit." He told them that he was resigning. Spady said that he would not give

another speech or presentation to anyone until the group of OBE proponents defines an

outcome even though there was a room full of attendees to address**.** Spady said:

> We have been carrying on this charade as if we're outcome-based for a decade and
> nobody has a definition because it's points for this and points for that and 80% of
> what and then you make it all up on Thursday night. This is a fraud…. It's not
> about just having people memorize content out of a book for Friday. I just said to
> these guys: I'm done. I will not do this. We have got to figure out what an
> outcome is. Until we do and until we have a definition, I quit**.** I cannot morally
> stand here and do this any longer. (W.G. Spady, interview, June 13, 2010)

Two weeks after Spady's diatribe at the conference, the proponents crafted a definition,

and they knew what OBE meant: "It was about demonstrating something."

According to Spady, an outcome was "a culminating demonstration of

something." It was not a number assigned to any activity or points or memorizing from a

book for Friday's exam. A demonstration verb, an action verb, was needed to generate an

outcome. "Culminating" referred to the end, to the completion of the learning experience.

Spady asked:

> Now, when is the end? Well, if you're time-based then the end is the calendar, but
> if you're outcome-based then the end is when you can do it…You don't get people
> to be self-directed learners by giving them assignments on deadlines, and that's
> what we're doing. That's what we're supposed to do. (W.G. Spady, interview,
> June 13, 2010)

OBE wasn't time-based. Additionally, Spady's brand of OBE was constructed around

"four great principles." These principles were "focus on outcomes of significance,"

"expanded opportunity," "high expectations," and "design down from where you want to

end up." The outcomes must be "outcomes of significance," or according to Spady,

"major things" that students can do that involve "complex" skills.

Spady shared a story about how this idea of outcomes of significance could

sometimes get out of hand and become overkill. He was visiting a school district that was

a leading OBE champion in Glendale, Arizona. His best teachers and consultants were

products of this particular district. One day, the Director of Assessment joyously shared

with Spady their newly developed outcome for senior graduation. They had decided to

graduate every student had to do an independent research project that is of such quality to

be publishable in a professional journal. There were 16 key criteria, and each one was

worth six points. Spady described the encounter with the Director:

> I said: Let me be sure I understand. Criteria No. 14 or whatever it is, it says
> 'perfect spelling and punctuation.' I said: Let's pretend that they had done all this
> research, and they wrote this thing. Half the words are misspelled. There are run-
> on sentences everywhere and incoherence, six points off. Well, we couldn't
> publish that. I said: Yeah, I know. Let's try another one. I go to some other thing,
> data analysis and presentation, okay? I said: All the numbers in the tables are

> wrong, but everything else is just fine, six points off. Oh, God, no, we couldn't publish that. I said: I know.
>
> I think the issue is that if this is to be held to a professional standard and all of these are essential criteria, every one of these criteria is worth 100 points. If you can't do it and if it's messed up, it's not publishable, and it's not professional. That is the day when I completely gave up on points because all they were doing was just throwing more points at stuff based on how we always throw points at stuff! (W.G. Spady, interview, June 13, 2010)

Over the years, at teacher conference after teacher conference, Spady came to the conclusion that there was no essential knowledge.

Spady invented the Friday test example to prove his point about essential knowledge. He would say that he knew that there were probably two million American classrooms. He was willing to bet the audience at his presentation a dollar on every one of those classrooms that on any given Friday the students were inside taking a test. He was willing to put another dollar on each classroom that the test they're taking had either ten or 20 items. He would be willing to stake another dollar that on that ten item test, every item was worth ten points, and on that 20 item test, every item was worth five points. Spady was getting richer and richer in fake money. He would continue:

> Just tell me: if they're in there taking that ten item test, and they have to get 70 to pass, do they have to get the first item correct in order to pass? 'No!' [from] the whole audience. Correct. Great. Okay, next item, do they have to get the second item right in order to pass? No, okay, good. How about the third item? There's this 'No' because they know what's coming. What about the fourth item? The sixth? The seventh? The eighth? (W.G. Spady, interview, June 13, 2010)

Spady's concluded that in traditional education no item was essential.

Spady claimed that there was no such thing as essential knowledge because a student could get one item wrong or you could get a different item wrong, and who cares? All that the teacher cared about was that a student got enough items correct:

It starts to just expose that all this stuff that people are calling essential standards aren't really essential. They're just preferable, and you know who they're preferable to? The college admissions office…We can pretend this is essential knowledge. (W.G. Spady, interview, June 13, 2010)

Spady developed a proposition around essential knowledge: "Nothing is essential but enough is mandatory. We have no idea what's essential! You just have to do enough non-essential stuff to pass." Spady attempted to get people away from thinking about numbers and start discussing what students could actually do.

At the end of 1986, Spady met Don Gresso who worked for the Danforth Foundation. Spady explained to him that he was trying to spread OBE to various school districts in different states. Gresso engineered a $50,000 grant for Spady for three years in a row to build networks of school districts committed to OBE across the country. Spady leveraged the grant well. He founded the Network for Outcome-Based Schools, and through this organization he built a network of OBE institutions in Illinois, Michigan, Minnesota, Iowa, a small network in California and a large one in Arizona. He only used the grant dollars to live on and pay expenses, and he personally would come to the districts and do training. By the late 1980s, 26 states had schools or school districts that implemented OBE, incredible growth in such a short time.

Spady also organized two week seminars in Colorado called the Vail Leadership Seminars in the summer of 1989. These were "vehicles for attracting attention" for OBE to be adopted in other schools. He became the tireless "transmitter" of OBE, and he was getting invited to speak about OBE at everything from local to national events. At that time, he initiated a notion that was adopted in many of the OBE schools: Grade in pencil

not in ink. Put something down, but it can be modified later. It finally got to the point that

one "savvy wonderful high school principal guy" announced to his faculty and staff: "The

rule in our school is every grade in your transcript is in pencil till graduation night."

Spady spread that idea ("every grade in your transcript is in pencil till graduation

night") throughout the OBE network and even other schools that had not adopted OBE:

> I immediately started putting the idea out and, of course, it ran in the face of
> nothing about inertia…There was a real dilemma there…if all the laws are written
> one way, how can you do something that's the other?...This is all part of this
> incredible nested web of institutional changes that have to happen if you're going
> to be able to do something different. It was just layers and layers deep, let alone
> public opinion, and public mental inertia about: I went to school, and it was good
> for me! (W.G. Spady, interview, June 14, 2010)

As early as 1968, when Spady declared to Block that he and Bloom were not going to

take American education by storm because the certification system drives the

instructional system, it became apparent to Spady that until the rules, regulations,

customs, and practices around certification which is controlled at the state level was

changed that OBE would run into a major obstacle: state law.

Spady knew that state law could prevent OBE from happening, and the detractors

of OBE would have a perfect excuse for not adopting the curriculum because "the state

won't let us." Because of the strong political support OBE enjoyed in Arizona, Spady

contacted the State Superintendent of Education, and Spady asked to take a look at

Arizona state law and state regulations around education. When Spady became Director

of Far West Labs, since Utah was in his territory, the educators in Utah, like Arizona, also

were interested in changing state laws and regulations around education. He compelled

Arizona and Utah to review the definition of a course. At that time, the two states

"defined a course as so many hours." Spady got these states to see a course as an event.

Spady also testified before the Minnesota legislature which got the attention of their state

Department of Education and their legislators. Spady recalled: "Suddenly this thing

elevated up [to] a level where I was dealing a lot with state level people, not just the

people in districts that make things happen."

From that first conversation with Block in 1968, Spady had been insisting on

systemic change, a radical change in organizational culture, "before any of those people

got famous…because it was part of my whole gestalt as a sociologist." One of "those

people" was Peter Senge. Spady remembered sharing a program with Senge. When Spady

moved to Colorado, he shared a dais with Senge:

> When I first got here, they did some kind of big shtick, and they invited Senge and
> me to be speakers…It would have been '91. Something like that. He charged
> them $25,000, and I charged them $1500 or something. Every staff member said
> Spady was way better than Senge. I watched Senge's speech. It was pathetic
> pablum. He got $25,000 for pathetic pablum, and I blew these people's minds.
>   This was a big district wide --These were separate presentations, and I got
> in some of the grading stuff. I was blowing the paradigm to pieces, letting them
> see what a trapped constellation of factors there are around the kids achieving
> success. I'm just blowing these walls open for them to look at this, and he is doing
> some very rinky-dink basic cutesy stuff, whatever it was. I didn't remember any of
> it. (W.G. Spady, interview, June 14, 2010)

Even if he didn't remember Senge's presentation, Spady did remember that this time was

the "heyday" of his development of OBE. He was truly "starting to break open the future-

focused role performer possibilities" of OBE that he had pioneered earlier.

Up to this point, Spady was struggling with the fact that outcomes were connected

to particular courses. He was looking for something "bigger than courses" to focus on.

The turning point for Spady occurred when he was hired as a consultant by Kathleen

Fitzpatrick, the Assistant Superintendent of High School District 214 in Arlington

Heights, Illinois. She was "a big believer in this stuff, an ally, a good person." She invited

Spady to give a critical seminar for her curriculum people. This was when Spady worked

at Far West in California. He flew a redeye to O'Hare to present to the district in

Arlington Heights. Fitzpatrick picked Spady up at the airport, and handed him the new

outcomes in six subject areas developed by the Illinois State Board of Education. She

wanted Spady to present using these new outcomes:

> It was like: Oh, shit. My eyes are plastered shut, and so I start reading these things. It starts out with language arts and then math. It's just all the stuff. As we're pulling out of O'Hare, the sun comes up and kind of hits me in the eye. I wake up a little bit, and I start reading again. The first one is: Students will read analytically and derive the deeper meaning of things or something like that. My brain said to me: Only in English [class]? I read the next one: Students will write articulate sentences, blah, blah, blah, only in English? It was like: Oh, my God.
>
> This revelation was happening as I read these. I got back to the first one, and I just put a little circle around it. Okay, like not just in English [class]? The page was two-thirds filled with little circles that I said: Man, do I have a seminar to give? Because everything everybody did was packaged around subject areas when the abilities are not about that, and we think we're parceling them out to the subject areas when, in fact, everybody could be having kids write sentences clearly and accurately! Everybody could have kids analyze problems and whatever, not just [in] science! So, I suddenly had the basis for what we called transitional outcomes, outcomes that cut across all the subject areas that everybody could be working on.
>
> Well, you can't imagine. It was like pulling teeth to get these high school subject people to realize that somebody else could be helping kids write coherent sentences besides English teachers. It was like: Hello, was this not obvious? Somebody could have kids think analytically and rigorously besides [in] science class. It was just unbelievable, but [we] unlocked the rigidity in that couple of days; we unlocked the rigidity and opened it up. We got out of what was traditional OBE to transitional [OBE]. But we still weren't there yet at all. (W.G. Spady, interview, June 14, 2010)

Spady was moving the curriculum from what he called traditional OBE to transitional

OBE by having the outcomes cut across disciplinary lines. However, he was still having

difficulty communicating his idea of an outcome to others.

Many individuals still saw outcomes as proficiencies or operational goals rather

than as future-focused life performance roles. Spady told a story about the superintendent

of schools in Aurora, Colorado who invited Spady to do some future-focused strategic

planning in his district. Aurora had a series of 28 district goals that the superintendent's

staff and faculty developed, and the superintendent wanted these district goals turned into

outcomes. Spady recalled one of the goals having to do with keeping all the drinking

fountains in good working order. To him, that certainly wasn't a student outcome.

Spady guided a group of 42 faculty, staff, school board members, and business

leaders in Aurora through a process of clustering and eliminating and reorganizing the

district goals expressly around student learning. By the end of an arduous day, the group

had "whittled" the goals down to 11 things. Oddly enough, District 214 in Arlington

Heights had also whittled their goals to 11, and Glendale, Arizona had been doing the

same thing, and they also ended up 11. Spady claimed that "everybody started to think 11

was the magic number for something."

Spady copied down the 11 goals from Aurora, took them home, and took a very

close look at them. He returned with the 11 goals in hand:

> Everybody is sitting there. It was like: God, we've got our 11 because 11 is the
> magic number. We had been numbering these things. They're all sitting there
> ready to go just like: We don't have anything to do today. We did it all yesterday!
> And I said: Well, I'll tell you what. I know you think we're done, but I don't think
> we are because if you look at number one and you look at number four they're

> kind of about the same sort of thing and so is the second half of number seven.
> (W.G. Spady, interview, June 14, 2010)

Spady assigned groups to look at goals that were similar. For example, one group looked at number one and number four and the second half of number seven. Another group looked at number two and number six, and Aurora ended up with five groups because there were shared links and connections amongst the 11 goals.

Spady sent the five groups off to discuss the links and connections. He charged each group with finding a common theme among these goals or pieces of goals that were similar. Soon one group returned with a list of attributes. Spady said that the attributes added up to "self-directed learner." Another group came up with a list of attributes that said "community contributor" to Spady. A third group provided a list that said "quality producer" to Spady. Spady added the word "who" to every label. The groups returned with large sheets of paper that said things such as: "self-directed learner who" and "community contributor who" and "quality producer who" can do various complex skills. They tacked the sheets on the wall:

> Everybody came up and read everybody's sheets: the whole routine. We all sit down, and somebody asks me: What do you think of these? I said, word for word: I don't know. I've never seen anything like this before.
> The discussion that followed was very interesting because the context for this was it doesn't matter how old the kid is, if they're a boy or girl, if they're black, brown, green or white, okay, what their GPA is, what courses they've taken, I mean, everybody understood this. We wanted every kid to walk out of this school district as a self-directed learner who can do these things and be a community contributor. It just ascended, but suddenly we had these role performer labels. Suddenly it was about human beings. It was the first time it wasn't about curriculum content and abstract capacities. It was about people, community contributors. Those are people! (W.G. Spady, interview, June 14, 2010)

The Aurora groups helped Spady to create the role performer labels. He said that the meeting was cathartic. A woman wept because she was an elementary school teacher who had never worked side by side with a high school teacher, and they now discovered that they had so much in common. One man announced that all students come to them at the age of five as self-directed learners, and he said that by fourth grade they weren't self-directed learners anymore. Spady had "never seen anything like this before" at one of his seminars.

He left the seminar for a three week tour of the country that opened with a meeting in Wyoming at the invitation of the superintendent and the school board there to discuss future-focused strategic planning. He said to the superintendent:

> If you really want me to work with you and do [future-focused strategic planning], you might end up with a framework of outcomes that look like this. I pulled out the famous sheet of paper that somebody had typed up real fast that day. He reads this and he turns and he said: We'll take these. He's going to put them in his briefcase, and I leap across this dinner table. I grab it, and I said: No, you can't have these. These belong to Aurora. He's pulling on this sheet: No, we want these now--with the whole school board watching. My brain says two things: Don't pull too hard or you'll tear this sheet, and it says: Gee, I think we have a winner here. (W.G. Spady, interview, June 14, 2010)

Spady knew he was on to something. However, he explained to the superintendent and the school board that they had to develop their own outcomes or there was "no ownership, no community input, no creativity."

The five things on the Aurora paper were self-directed learners, collaborative workers, complex thinkers, community contributors, and quality producers. They mapped against Spady's five "Cs": conscious, creative, collaborative, competent, and compassionate that he shared in his 2001 book *Beyond Counterfeit Reforms*. Spady

described the original process for developing an outcome using the Aurora method: use one adjective and one noun, that is, "one qualitative attribute with one performer label," to arrive at something such as "self-directed learner." Then, add a demonstrating verb and some complex skill. This evolved to a two adjective, two noun framework, for example, a "creative, self-directed learner who designs a presentation." By the time Spady finished his three week circuit around the country, people were "rabid" over these labels for what students should aspire to be. Each stop was inventing its own versions of it. By the time he returned to Aurora, he had "about a dozen places already working on something the same."

For Spady, this new way to look at outcomes transcended curriculum based on content. He called it "transformational OBE." According to Spady, transformational OBE didn't make content irrelevant; it just didn't make the content the end in itself: "This was about human beings." Spady explained:

> I've got all these examples of all these people who really said this is what it should be about, all of whom run into the institutional inertia juggernaut: The laws aren't about that! The rules aren't about that! The teacher contracts aren't about that! The curriculum structure isn't about that! The grading system isn't about that! The university admissions office isn't about that! Nobody knows what to do with this terrific stuff. It's just sitting out there with no connection to anything anybody is doing because we're all doing educentrism with a vengeance, and that's all this school reform stuff is…
>
> What happens if you say: Tell me a little bit about human beings? If you talk about human beings, you create none of those constructs. Tell me a little bit about the future. None of those constructs. Tell me a little bit about the spheres of living and arenas of living that human beings engage in their lives. You create none of those constructs.
>
> The whole argument in my book *Beyond Counterfeit Reforms* was if we simply started with learners and life we would never create the schools we have today because they're not about learners and life. They're about a set of artificial constructs that we have institutionalized, legalized, internalized, and reinforced

for about four generations now, and we now think God created them and to change them would be sacrilegious! No, no! But that is how culturally entrenched school has become…We're talking transformation. (W.G. Spady, interview, June 14, 2010)

Spady was up against "educentrism with a vengeance." Transformation can be problematic for many individuals, especially when it comes to "a set of artificial constructs that we have institutionalized, legalized, internalized, and reinforced for about four generations now" or, in other words, the educational system in the U.S.

However, for Spady, the "biggest fear" that he heard during his travels came from teachers he met who believed that they didn't have the ability to step out of their discipline. These teachers were now being asked to develop "self-directed learners, collaborative workers, complex thinkers, community contributors, and quality producers" who were also "conscious, creative, collaborative, competent, and compassionate." These teachers saw themselves as subject specialists who were there to teach their particular subject content, and what Spady was proposing effaced their professional identities and removed them from their psychological comfort zones. His mission was to sell his brand of transformational OBE.

During these years, Spady concentrated much of his effort with the Network for Outcome-Based Schools on pitching his idea of OBE to people who felt that it was "bigger than them." For many, the idea was a great one but untenable in a traditional educational system:

> There were countless people out there with good ideas that link into all of this. It is we have no organized political voice. It's not that the smart people aren't out there. It's not that the ideas aren't out there in one form or another. It's that there is no organized political voice for it. That's why I call it the juggernaut. We cannot

penetrate politically the inertia and momentum of the juggernaut. We don't know how. (W.G. Spady, interview, June 14, 2010)

Spady believed that OBE could be adopted in the U.S. in the form created in Aurora if there was an "organized political voice" for reform. However, the "juggernaut" of entrenched cultural and organizational practices would prove difficult for Spady to handle, especially in Pennsylvania.

Spady recalled this time of the rapid growth of OBE as well as the end of the Network for Outcome-Based Schools:

> In terms of time, focus, and attention that '86 period was when I really was able to step in full blast and put my total self into building that movement and then it became apparent −When did it happen? Somewhere around '92 or so the situation within the Network for Outcome-Based Schools got so problematic and divisive that I quit, having been basically the founding director and the editor for years. (W.G. Spady, interview, June 14, 2010)

Spady blamed the demise of the Network for Outcome-Based Schools on Block. Spady described Block as a "very unhappy, jealous man." He likened Block to Fearless Fosdick, a character from Al Capp's *Lil Abner* comic strip. Fosdick was known for his square-jawed obliviousness in the midst of the turmoil that surrounded him:

> When we really started to make a success of this outcome-based thing, he just had to get in because he hadn't been involved at all…I hadn't seen him in ages. He came to the first board meeting. It was in Illinois. Everything I said, everything including 'The sun came up this morning,' he took issue with and launched into diatribes. We got almost nothing done in two days. Every time I opened my mouth, it was another, 'Oh, that's not true.' (W.G. Spady, interview, June 14, 2010)

Spady got so frustrated that he finally came to the conclusion that nothing would move forward with Block. However, there was another more pressing concern. Eleven people sat on the board of the Network for Outcome-Based Schools. Spady saw that every vote

on every issue was eight to three with him on the short end. He had no interest in

continuing to attend meetings where everything he suggested or did or believed was going

to get voted down by eight people. Spady quit. A year later, the Network folded, and the

rapid rise of OBE would soon end.

<center>*Pennsylvania*</center>

Spady's first book on OBE, *Outcome-Based Education: Critical Issues and

Answers* (1994), declared three things: The system was broken. Nobody could define an

outcome. And, there were three different kinds of OBE: traditional, transitional, and

transformational. Spady remembered:

> We got crucified for the third kind called transformational, future focused, real
> learner performance, doing real things that real human beings do, got crucified
> because it wasn't test scores in academic subjects. It was people's capacities to do
> something. (W.G. Spady, interview, June 13, 2010)

Spady "got crucified" in Pennsylvania where Spady and transformational OBE were

attacked by forces led by Peg Luksik. By the early 1990s, twenty-six states in the U.S. had

some form of OBE in their schools influenced by Spady's work. However, after

Pennsylvania, the rise of OBE ended abruptly.

For Spady, Pennsylvania embodied "the best and the worst of everything"

regarding OBE and his forays into curriculum innovation. He had been invited to speak at

the Pennsylvania Association for Supervision and Curriculum Development (ASCD)

conference which was held at the Hershey Conference Center. His colleague, Ron Brandt,

hosted and organized the program. Brandt invited Spady to discuss OBE because OBE

had become "the rage." While Spady was setting up his overheads for the presentation, a

man approached him and asked about his thoughts concerning Pennsylvania's new state-

wide outcomes.

Spady admitted that he knew nothing about the Pennsylvania outcomes. The man

said that there were 586 of them. Spady said to him: "Then they're not outcomes because

nobody has 586 outcomes." The man asked: "How many should you have?" Spady at

first answered that he wasn't sure but because the man persisted Spady told him: "It tends

to be when people do this right somewhere between seven and ten." The man said: "Oh,"

and disappeared. The next day people sent Spady headlines from the newspapers. The

man apparently returned to the State Department of Education and told them that: "Spady

said we shouldn't have 586 outcomes. We should only have ten or something like that."

As a result, the Pennsylvania State Department of Education rescinded the 586 outcomes.

Spady explained:

> In Pennsylvania, they've got this dual royalty thing where they have a Secretary of
> Education and a Commissioner of Education. One of them is sort of more
> beholden in this direction, and another one is more beholden in that direction. I
> suddenly got invited to Pennsylvania to talk to them because the 586 were simply
> curriculum objective type things, needless to say. I did my presentation. I left
> town, and I hear a couple weeks later they've rescinded this whole thing because
> of ME! (W.G. Spady, interview, June 14, 2010)

According to Spady, they rescinded the outcomes because "if the guru says we shouldn't

have them, we don't want to do anything wrong." Soon enough, Spady got further pulled

into the Pennsylvania situation while he was doing work in Washington, DC.

During the summer of 1993, Spady met the man who served as the Pennsylvania

Secretary of Education. The Secretary had a deadline he needed to meet because a report

was due to the State Board of Education by a certain date and then to the legislature. The

Secretary was so pressured he asked Spady to write outcomes for him. He would be in

"deep political trouble" in Pennsylvania if he didn't deliver the outcomes by the due date.

Just as in Wyoming, Spady told the man that the outcomes had to be his own. Spady

wouldn't write them for anybody. Spady recalled the meeting:

> He said: Please, write our outcomes for us. I'll claim we did it, okay? I said:
> Okay, I need something to work with. What have you got that I could massage or
> work with or whatever? He's going through the stuff, and among other things he
> gives me this set of Ten Goals for Education for Pennsylvania. I looked at them,
> and I said: Well, God, here you are. Now, as we all know, the reason you write
> goals is so they get ignored!
> They had this document that had been sitting there. It had been written
> years before. It was just sitting there collecting dust. Nobody was paying any
> attention to it and in terms of the kinds of things we were calling an exit outcome
> that was the stuff. What I did was two things. I put action verbs where they were
> needed and maybe a little bit of massaging of wording, very little. I also did some
> operational stuff because my big line was how would you know one if you saw
> one? Okay? What are you going to see them do in a little more detail, okay? I
> wrote this thing, and I sent it in. (W.G. Spady, interview, June 14, 2010)

Spady prepared the document using the "Ten Goals for Education for Pennsylvania," and

it was delivered to the Pennsylvania State Board of Education and the Pennsylvania

legislature. Spady's brand of transformational OBE was on the verge of being a part of

state regulations and law.

However, just when the state goals were to be presented to the constituencies by

the Board and the legislature for discussion, the Pittsburgh newspapers were on strike,

and there was no press. The Pittsburgh papers usually provided a strong voice in

Pennsylvania state policy. Because there was no forum for the supporters of the state

goals, Peg Luksik used her forum based around local conservative groups to fill the void

left by the newspaper strike although her message was not a supportive one. One of the

state goals was: We want students to be tolerant of other people. Somehow, Luksik's

group turned that goal into OBE's advocacy of homosexuality. Spady was shocked:

> There was no way to challenge this preposterous thing! Their network just grew
> and grew, and it exploded…I finally got pulled into -- it was about '94, into some
> statewide big debate thing in Pennsylvania and there was this state senator there
> who had been putting out a newsletter claiming that OBE advocated teachers
> having homosexual sex with their students in class. This is in this guy's
> newsletter. Okay? He stood up and said: And, nobody will ever prove me wrong!
> (W.G. Spady, interview, June 14, 2010)

The State Secretary of Education told Spady later that the Pittsburgh newspapers carried a

lot of weight, and because of the newspaper strike there was no way for the State

Department of Education to get their message to the public to counteract any of Luksik's

claims. The detractors of OBE could spread their message easily without local

newspapers. The Pennsylvania furor around OBE and its purported advocacy for

homosexuality became an event for the national educational press.

According to Spady, the national press wasn't really interested in knowing what

OBE was about; they were just interested in all of the hysteria itself. The national press

followed the story and attracted national conservative groups to the Pennsylvania furor.

The Religious Right represented by Focus on the Family, G. Gordon Liddy, Phyllis

Schlafly, Pat Buchanan, and others joined Luksik's attack. They claimed that OBE

influenced children to embrace alternative lifestyles. Spady even debated Buchanan on

The Pat Buchanan Show on the merits of OBE while defending his curriculum against

charges of it being some form of mind control or social engineering. Spady remembered

with some bitterness:

These people were so pathetic that their own arguments against OBE were their arguments against themselves, and they didn't even know it. It was this zealous following that whatever their leaders would say they believed. It was the Phyllis Schlaflys. It was Bob Simons with whom we tried to build this [consensus]. It was Dobson and the Focus on the Family down here in Colorado Springs. I debated Gordon Liddy, I mean, just these insane people, and you couldn't reason about anything. You couldn't use a simple example of anything. They were just off into their stuff.

       This really is mind control, isn't it? I don't know. I haven't tried it. Don't know. Maybe it is. I mean, God, fluff. Anything that wasn't phonics, Phyllis Schlafly! Anything that wasn't phonics was fluff. It didn't matter what you were learning or what you were doing, it was just fluff because it wasn't phonics. So, you really don't believe in phonics! It's like: I have no position on phonics. This has nothing to do with phonics. It was American ignorance manifested in its highest elevated form. (W.G. Spady, interview, June 14, 2010)

Spady said that "the exaggerations and the distortions" just fueled more exaggerations and distortions.

Spady explained that most of the groups were set against the state having any influence on "the beliefs of their Christian children." Spady wryly offered: "So being tolerant in society was anti-Christian in their view." According to Spady, these detractors argued that anything that dealt with "the values and inner development of young people" either lacked academic weight or it was "psychological mind control." Spady recalled the reaction from the national press and the rest of the country:

[These groups] were just given cart blanche, and the education press was taking them seriously. Oh, these poor aggrieved parents whose kids are being brainwashed with OBE! I bounced all over the country, and there never was what I would call an intelligent discussion about it anywhere. It was just hysteria. It was just completely distorted, exaggerated hysteria, and I was being coached left and right [by] all these people: Don't say anything bad about them. Just keep being nice. So, I kept being nice [while] watching the whole world fall apart! It's kind of like dealing with the Republican Party in Congress: Just keep being nice. Look for common ground. And I was! I couldn't find any. (W.G. Spady, interview, June 14, 2010)

For Spady, the hysteria generated in Pennsylvania made it difficult to find any "common ground" with these groups. However, Robert Simons was the one representative of these groups who attempted to reach out to Spady.

He provided the forward for Spady's 1994 book *Outcome-Based Education: Critical Issues and Answers*, a book designed to answer the critics of OBE. Simons shared the stage with Spady at the AASA program two years in a row as a result of the furor to discuss their differences. He would take the stage and say: "[Spady's] the most honest guy that I've ever known, and he's this nice fellow. I don't know why all these people don't like this." According to Spady, it didn't do much good and Simons "got basically ostracized out of the true believer camp."

Spady recalled that there was nothing that could stop what was happening to him and OBE:

> The fire storm got started in the fall of '93, and then it just spread, just rampantly for another two years until they had burned the landscape down, and so there was nothing left. What I tell people is I know of six state superintendents who got fired. In the case of three of them, it was because they knew me, not that their states had done anything: they knew me. That's how hysterical this reaction was: Oh, my God, he knows Spady. Well, let's fire him! (W.G. Spady, interview, June 14, 2010)

Many more individuals who had worked closely with Spady were under threat of being fired. To save their livelihoods, they sent letters denouncing Spady and OBE. In their letters, they rejected any association with Spady and his work. Spady recalled the pain of these former friends:

> I pitied the poor people out there who were under these kinds of pressure and this kind of duress because they're looking at their whole careers being destroyed because they were doing this evil, perverse work. I went from those 220 some

consulting days in '92 to zero in '95…I went two full years without any work whatsoever. To know me was the kiss of death. (W.G. Spady, interview, June 14, 2010)

For Spady, the "kiss of death" meant a two year period of unemployment and "profound disillusionment." He spent most of his time at his home in Colorado skiing and riding his bike in the mountains.

After the Pennsylvania furor died down, Spady did some training and consulting in large urban school districts that were out of the range of his detractors. He did some training with the Chicago Public Schools, and he also did some work in Los Angeles and in Detroit. However, it was two and a half years of very little activity until his friend and co-author, Chuck Schwahn, contacted him. Schwahn knew a school superintendent in northwest Illinois who had formed a consortium of school superintendents who were interested in Spady's future-focused strategic planning program. Schwahn and Spady led a program that really impressed one of the school superintendents from Grayslake, Illinois. Spady started to work with the Grayslake Board of Education to implement transformational OBE in the Grayslake school district.

However, what happened in Pennsylvania soon followed Spady to Illinois. Peg Luksik and other opponents of OBE from Pennsylvania contacted parents in Grayslake. They warned the Grayslake parents about OBE and its purported links to mind control and social engineering. A public forum was held in Grayslake with Spady at center stage:

> For three hours I stood there and had people berate me and ask me loaded unanswerable questions and tell me I should get out of town because I was going to destroy their schools. This went on for three hours. They lined up down the front, up the thing, across the back, one person after another: We understand you consulted in this place and you charged them a lot of money! I didn't charge

anybody anything. My company, as these things go, charge so much for my time; it went into the kitty. I got paid a salary, and it was a fraction. I was being accused of this and being accused of that; it just went on for three hours.

      The rapport I had established with the [Grayslake] Board of Education and the staff just all went up in smoke, just bang like that! I don't know what happened. I don't know how many of them got fired. It all happened about a week after my mom died, and it was just like: Holy moly, this is about as bad as it gets. (W.G. Spady, interview, June 14, 2010)

Like Pennsylvania, Spady described the Grayslake meeting as a "crucifixion." He was surprised that "they" wouldn't let go. He believed that even if he returned to school districts in the U.S. today that "they" would "come back." However, Spady said that unfortunately with the educational standards movement keeping these groups "happy" he may be "insignificant" now because "they" had transformed their rancor against Spady and OBE into a national movement.

CHAPTER FIVE

GLOBAL REACH

South Africa

In May of 1997 Spady answered a phone call from a professor who taught at Ohio University in southeast Ohio. The professor was hosting 35 South Africans on campus, and they wanted to talk to Spady. The South Africans asked if Spady would accept a conference call to answer some questions. Spady was "literally floored" when the professor added: "I suppose you know the whole country is building or doing its educational reform around Outcome-Based Education?" Spady had no idea that in 1995 transformational OBE had been adopted as the national curriculum of South Africa by the African National Congress (ANC) led by Nelson Mandela under the banner of Curriculum 2005. The ANC wanted to use this transformational curriculum to unite many disparate school systems formerly divided according to ethnicity and race.

The professor told Spady that the group of South Africans would be at his campus for six to eight weeks. The group was sponsored by the U.S. embassy in South Africa as part of a program involved with developing English language teaching in the country. The woman who had organized the trip to Ohio University was Dolores Parker, an educator who worked for the embassy. She wanted the group to split their time in the U.S. between learning English language instruction and learning about OBE. Spady made a

deal with the professor. He had a trip scheduled to go to Washington, D.C., and if the group paid the difference in his airfare he would gladly stop in Ohio to meet these people in person.

Spady arrived and met the first evening with a handpicked group of five who had been designated to do a preliminary orientation to get to know Spady. He would meet the remaining individuals the next day. He recalled seeing Anne Schlebusch at the first meeting. According to Spady, Anne was "just a marvelous curriculum" and "language arts person" who also became a "very dear friend" and a co-author. She worked for the Western Cape Department of Education which is where Cape Town is located. Spady described the meeting with the five:

> It became evident from this first evening chat that… they were completely confused. They didn't know anything [about OBE]. They knew I was Mr. OBE somehow because they had read about it. They had done their homework. They read articles…They knew that they needed to talk to me if they could, but they were so far out in some field or other with what they were doing, it was unbelievable. (W.G. Spady, interview, June 14, 2010)

Spady recalled the "nice discussion" but he also remembered the looks on their faces when he explained what transformational OBE meant to him: "They're looking at each other like, oh, shit, those kinds of looks. It's like: 'We're in trouble.'"

By tea break the next morning, the entire group was in "absolute total shock" because they were unfamiliar with Spady's brand of transformational OBE, even the most basic principles like what an outcome was. The big problem was that the ANC was already two years into the implementation of Curriculum 2005 in South Africa, and the individuals at the National Department of Education weren't doing what they thought

they were doing. Spady knew that the group would be interested in him traveling to South

Africa:

> You couldn't look up OBE in anything about North America and not discover
> me...What they had done prior to me is they apparently had discovered this group
> in Ontario that knew all about OBE, and they had invited these Ontario people to
> help them. By the time I got [to South Africa], they were so screwed up it was
> absolutely unbelievable and irredeemable because then the National Department
> of Education had dug in its heels. (W.G. Spady, interview, June 14, 2010)

The Ohio group wanted to get Spady to South Africa to help the South African National

Department of Education implement transformational OBE and redeem Curriculum 2005.

According to Spady, when the ANC adopted transformational OBE they were

unfamiliar with "all the political crap" in Pennsylvania and in other parts of the U.S. that

had occurred around Spady. They didn't know that "OBE was a dead concept in this

country, a dead label by the time 1997 came around." They had been "desperately looking

for effective models of education and effective practices," and they were searching

worldwide. They discovered OBE because people in the labor movement "sort of knew

the lingo about OBE" through Kader Asmal. In the first Mandela government, Asmal

served as the Minister of Water and Public Works, and he later became Minister of

Education during Mandela's second term. Asmal had lived in Scotland, and his children

attended a school that had adopted OBE. He became an important supporter of Spady:

> So, from within the cabinet, the Mandela cabinet, [Asmal] supported the label
> OBE which was [actually] CBO. I don't know how all this happened. It was
> mainly a group of labor guys who decided it was going to be [about] Curriculum-
> Based Outcomes. They were giving an outcome focus to the programs and the
> curriculum they already had. (W.G. Spady, interview, June 14, 2010)

For two years, the South African National Department of Education supported the label "transformational OBE," but they were certainly not advocating Spady's brand of transformational OBE.

According to Spady, the educational systems in South Africa were so "profoundly entrenched" in Curriculum-Based Outcomes (CBO) that when the concept of transformational outcomes was discussed all the administrators could do was to think about curriculum content. Labor union people in the ANC had created the framework and adopted the label: transformational OBE. The ANC's version of transformational OBE depended on Twelve Critical Outcomes that Spady claimed were actually "a mishmash of a bunch of stuff that one of my buddies basically said they stole from New South Wales in Australia." Spady described how the ANC arrived at the Twelve Critical Outcomes:

> They had these seven lousy statements, and then the story was this secretary saw these other five things on a sheet and added them to it. These were five totally other weird things, and they came up with the rationale for what they were. So they had a rationale for the seven. They had a rationale for the other five. They wouldn't move off of their labels. They wouldn't move off of their rationales, and it was just a bunch of mishmash junk, and nothing was expressed in real outcome terms. (W.G. Spady, interview, June 14, 2010)

For Spady, a transformational outcome must be expressed using an adjective or two and a subject/noun that identified a learner who does some complex skill such as a "self-directed learner" who can design a research project. The outcome would be future-focused and connected to a life performance role.

However, the ANC ended up with Twelve Critical Outcomes which were focused on mastery of content. Before Spady had arrived, they created task forces for particular

disciplines such as English and Mathematics and "farmed" the 12 statements to everyone

in every discipline. Spady recalled:

> Somehow in this perverted, distorted process they emerged with 66 Specific
> Outcomes. The 66 Specific Outcomes were the most diverse, mishmash, worst
> examples of anything than either the seven or the 12 or whatever that number was.
> All of this had been done before they ever talked to me. So I told them what OBE
> was, and I told them what an outcome was. I gave them examples, and they were
> in absolute total panic. (W.G. Spady, interview, June 14, 2010)

The 66 Specific Outcomes were a list of specific competencies, not what Spady would

call transformational outcomes. There were some lower level functionaries from the

South African National Department of Education among the group of 35 who visited with

Spady in Ohio. They wanted Spady to come to South Africa to help them as soon as

possible.

Spady called the timing of his first trip to South Africa "absolutely, unbelievably

perfect." His flight from Denver was supposed to be early one October morning in 1997.

However, a gigantic blizzard completely paralyzed the area for two days, and he was

snowed in. The airport shut down, and Spady couldn't make it to South Africa. Spady

believed that it was the "best thing that ever happened" because they had him scheduled

to be on national television the minute he arrived in Johannesburg, and he "didn't know

anything about the country, about how things worked, about what was really going on."

Spady's hosts decided to bump the television appearance to the last two days of

his trip because of his late arrival. By that time, he felt that he really knew what "the

score" was because he had been all over the country lecturing, meeting people, learning

the vernacular, and "getting the feel of what was going on." When he appeared in

Johannesburg**,** instead of it being at the beginning where he believed he would have embarrassed himself, it was at the end of his trip where he had a better understanding of South Africa.

Dolores Parker had charged the 35 South Africans who met with Spady in Ohio to return to their local constituencies and organize seminars to host Spady in each geographic area throughout South Africa during the first tour. Spady spoke at the University of Cape Town. He presented at the teacher training center at Umtata in Tzaneen, "which was halfway to nowhere." Spady said that he was a "complete, total, physical and psychological wreck by the time it ended." He had spoken to about 4,000 people at these seminars about OBE, and Spady said: "It wasn't anything like what the National Department of Education was calling OBE. That wasn't OBE at all."

During the flight to South Africa, Spady had studied the "pathetic, terrible documents" that had been Curriculum 2005. He wanted to see if he could "build a systematic rigorous model out of this mish mash of crap." He invented a pyramid with the South African national goals at the top. When he landed, he was taken immediately from the airport to a curriculum design meeting in Pretoria. Salama Hendricks was running the workshop, and they were working on English discipline outcomes. Mswei Kibi walked up to Spady after his obligatory OBE speech, and Spady showed him the pyramid. Kibi introduced Spady to Hendricks who said that when Spady returned to Pretoria after the end of his lecture tour that he would be invited to present his OBE pyramid during a presentation to the entire South African National Department of Education.

Spady explained the politics of South Africa by looking at the different areas and pointing out the perceived differences and political intricacies:

> South Africa is broken up into provinces, and the province around Johannesburg is called Gauteng. That's the big power base. Pretoria and Johannesburg are both in Gauteng. So Gauteng runs everything, everybody thinks. The other biggest one with influence is Western Cape Province which is the big geographic area. Cape Town is the big city. Then there is the world famous and notorious Eastern Cape which is where Mandela and all the revolutionaries came from. It's the most rural-ish, dysfunctional province. The Eastern Cape provincial government is profoundly dysfunctional, and it doesn't matter who is there. It doesn't matter who is running it. It doesn't matter who you elect. It's just profoundly dysfunctional.
>
> Then there is a huge rivalry around the KwaZulu-Natal province because that's where the Zulus live. That's where Durban is. [For] the Zulus and the Xhosas, it's the Hatfields and the McCoys. The Zulus think they are way smarter, way more organized, way more this, and way more that. A lot of good things happen there because KwaZulu-Natal is also populated pretty heavy by Indians from India, and, man, are they on the achievement path… There is a rigidity to their whole interpersonal way of interacting. (W.G. Spady, interview, June 14, 2010)

Spady complained that the Afrikaners, like the Indians, were also so "stuck" in their ways that they had little interest in curriculum change. However, according to Spady, the English South Africans understood transformational OBE and wanted to do something substantial with it.

During that first national lecture tour, Spady met some English South Africans who successfully deployed OBE. One was Roger Matlock, the director of the foundation that Delta Motor Corporation had established. Matlock's wife was a friend of Dolores Parker from the embassy. Spady met Matlock in Port Elizabeth through Des Collier who had attended and enjoyed one of Spady's lectures and saw OBE as a viable educational initiative. With funding from the Delta Foundation, Collier and Matlock "re-engineered" transformational OBE to create a training program for administrators and faculty. Their

program, Practical Training Programme for School Leaders, won international prizes

including the "Star of Africa" from the American Chamber of Commerce.

At the end of his first tour, Spady was finally invited to present for the entire

National Department of Education. Spady presented on how to assess outcomes in

transformational OBE. Nobody showed up. Nobody showed up except the people who

Spady had already met in Ohio and worked with in the regions. Spady ended up hosting

12 people he already knew along with Salama Hendrick. Nevertheless, Spady powered

through his presentation. Spady recalled: "The whole thing ended on the ultimate low,

that initial lecture tour after the thousands of people."

When Spady returned to South Africa in 1998, Port Elizabeth became his home

base because he had established a strong relationship with Matlock and Collier. He also

met an educator and teacher trainer, Pam Ballan, who attended his seminars, and they

were married that year. In 1999, Collier persuaded Matlock to fund an intensive OBE

trainers program featuring Spady and Roy Killen. Collier recruited 55 people who wanted

to become official OBE trainers and work with Spady and Killen. Matlock said: "You've

got 55 to start with. Let's see. You'll end up with about 25 people at the end. This is South

Africa." Matlock told Spady not to be disappointed. He said these individuals won't learn

anything either because of their lack of motivation and commitment. Matlock claimed:

"It's just built into the culture, the mindset."

The first night of the training Spady told the 55 people that nothing will change if

they continue to use the word "school." Spady said: "'School' is nothing but all these

boxes and all these categories. That is not OBE. As long as you say 'school,' everybody is

going to say: Oh, well, school! I know all about school! Then, you're done!" The second

night Matlock arrived to assess the training. He gave them a rousing speech, welcoming

them all. He finished his speech, and the 55 people applauded. Then, Spady asked:

"What did Roger say that is not OBE? And 55 people all said: He said 'school'! They

jumped all over him!" Spady said that this group was thoroughly engaged. He took them

through the future-focused strategic planning as he had done many times in places like

Colorado, Pennsylvania, and Wyoming, and they responded with energy and creativity.

Spady said: "Three and a half weeks later, 55 people finished the program…It was just

amazing. So the point is: it can be done. It could be different, but when you get the

bureaucracy involved at any level--" (W.G. Spady, interview, June 14, 2010).

During Mandela's second term when Kader Asmal became the Minister of

Education, Anne Schlebusch worked for a man named Nicol Fassen in the Department of

Education for the Western Cape. Fassen was planning to leave the Department and accept

a position with the largest publisher in the South Africa called Tafelberg. On Spady's

second trip, he teamed with Schlebusch to write *Curriculum 2005: A Guide for Parents* in

1999. Fassen helped to get the book published at Tafelberg. The guide was translated into

Afrikaans, and it was also available in English. One of Schlebusch's neighbors happened

to be an adviser in Asmal's unit. She was standing at a bus stop one morning and told the

adviser that she had recently co-authored a book with the "father of OBE." She gave a

copy to the adviser, and the book soon found its way to Asmal's desk along with Spady's

1994 book on OBE.

In October of 1999, Spady and Dee Parker from the embassy were summoned to Asmal's office. Spady recalled his first meeting with the Minister of Education:

> We walk in; it's a big office. He's sitting behind his desk way over on the other side because he's got a conference table, and he's got my two books on the desk. He's got little taggy things, and the books look like porcupines. He's got taggy things everywhere in these two books. Okay? He doesn't even say: Hello. He's still behind the desk, and he picks up the two books. He drops them down, and he said: That's OBE, and everything else out there is crap. That's his opener. He didn't even say hello, okay? That's OBE! Everything else is crap! (W.G. Spady, interview, June 14, 2010)

A representative from the National Department of Education also attended the meeting with Asmal. Spady called the individuals from the National Department the "Queens of Content." He described the "Queens of Content" as "university based" and educentric because of their obsession with the matric exams. Spady claimed that their only rationale for any educational decision was based on if the students could pass the matrics, the high school final exams that gave each student a number. If the number was high enough, the student might have the luck to attend the university. Spady complained about the matrics and the mind-set:

> Everything was about the matrics. It was totally British, and everything was based on the British grading system. Fifty percent was pass. Eighty percent was perfect because only God could do things higher than 80! They were so locked into this mentality that there's nothing you could say, and all they wanted [was]: How do you do assessment in OBE? Guess what? They didn't want to know about assessment. They wanted to know about marking! They simply wanted to know: Well, how do you give them grades?
> What we call grades they call marks. How do you give them grades in OBE? Not how do you assess an outcome better other than: Oh, I give 10 points for homework. It's like: how do we add up the points to know what marks to give them? It had nothing to do with what the vernacular [in the U.S.] called authentic assessment: real demonstrations…We were calling them authentic demonstrations. [South Africa had] nothing to do with that.

> Everything was pencil, paper, and how do I give them marks? Is 50 percent pass now in OBE or not? Shit, 50 of what? I would say: Geez, 50 means you can't do half of it. That's pass? I just walked into this hyper-British, hyper-Afrikaans entrenched cultural and institutional paradigm. They were going to do OBE? (W.G. Spady, interview, June 14, 2010)

The representative from the National Department of Education was there to offer a "counter-voice" to Spady and Parker. Originally scheduled for an hour, the meeting with Asmal lasted more than two and a half hours.

Asmal told Spady and Parker that the Department of Education needed to do a formal review of Curriculum 2005 because there had been constant criticism of the initiative. The proposed curriculum was to be potentially implemented in 2005, and the meeting with Asmal was in late 1999. Time was running out, and it may be an embarrassment for the Mandela government if the national curriculum was stalled. Additionally, for Spady, the need for review was "apparent because things were just falling apart everywhere." Asmal asked Spady to organize an OBE conference when he returned to South Africa where he would present to the hundred most influential educators in the country. Asmal wanted Spady to help his people understand what was in the 1994 and 1999 books on OBE.

Upon Asmal's urging, Spady met with Ihron Rensburg who was in charge of Curriculum 2005. Spady remembered that Rensburg didn't like him and that he once arrived for a luncheon meeting "45 minutes late, said hello, and left." Rensburg directed Spady to Tami Imsuelo, a PhD from Stanford, who was Rensburg's deputy in charge of a facet of Curriculum 2005. Spady recalled his first meeting with Imsuelo:

He was the most arrogant person I've ever meant, ever. He knew everything about everything, and he just knew about everything and anything I said. It was almost like the Jim Block thing! I would say a sentence, and he would go on a great essay about everything. He knew about everything and everything and everything. It's like, holy shit. We walked out of there like: Oh, my God. (W.G. Spady, interview, June 14, 2010)

The meetings with Rensburg and Imsuelo did not bode well for Spady and his "command performance" for Asmal.

The OBE presentation for one hundred of South Africa's most influential educators occurred on January 22, 2000. Spady invited Matlock and Collier. Another person from Spady's Port Elizabeth team, Sue Westrod, attended the event. However, a "famous guy in the struggle" for democracy in South Africa had died earlier in the week, and there was a memorial service for him that same day. Since Asmal was a cabinet minister and a part of the struggle, he was obligated to attend this memorial service. Asmal told Spady about the memorial service when he arrived in his limousine at this "big fancy venue" outside of Pretoria with a red carpet entry for Spady and Asmal.

Asmal gave the opening greeting and an orientation for the day's presentation. According to Spady, Asmal said:

This is the most important thing in the entire universe, et cetera, but I have to leave. I have instructed my deputies on what we need. After Doctor Spady's presentation, we're going to do this, and we're going to do that. Then there will be lunch. Lunch is always the most important thing, and then there will be more discussion, and we will plan the universe! (W.G. Spady, interview, June 14, 2010)

Asmal left, and Spady was allotted one hour to give an OBE speech to the hundred most influential educators in the country. Every Minister of Education for every province was

in attendance. The audience also included many "Queens of Content" from the National

Department of Education. Spady remembered the reaction from the assembled educators:

> I'm looking at an audience, 75 percent of whom don't move. They don't smile. They don't take a note. They don't do anything but sit with their arms crossed and scowl for 45 [minutes] or for an hour. I thought: This is really going over great. I do the best job I possibly can of explaining what [OBE] is and what [OBE] isn't to try to get them to see that competence is not the enemy of content because they were all: He doesn't believe in content! Competence is the step beyond. What can you do with content, okay? (W.G. Spady, interview, June 14, 2010)

After Spady's hour, they break for tea. Spady called tea "the most important time in the

world" in South Africa.

At tea, Spady wrapped up his materials, and Matlock stopped by to comfort him,

telling Spady not to take anything personally, that this is just how it was in South Africa.

Spady grabbed a cup of coffee and some cookies, and he was standing in the tearoom

with a plate of cookies in one hand and a cup of coffee in the other hand. Helen Zille, the

Minister of Education in the Western Cape, approached Spady. She was soon to be

elected the mayor of Cape Town:

> Here comes Helen. Helen walks up to me. This is in the middle of a hundred people. [She] starts screaming at me: You are destroying education in this country, and you are doing this, and you are doing that. I'm standing there. I don't know what to do with the cup of coffee. I don't know what to do with the cookies, okay? I can't defend myself. She's screaming and screaming at me, and all these people form this big circle around us watching her scream at me: How dare you not think that London is most wonderful city in the world? I have two children studying there! On and on this goes, and she finally walks away. (W.G. Spady, interview, June 14, 2010)

Zille returned to the hall for the remaining discussion which was led by Rensburg and

Imsuelo, Asmal's deputies in charge of Curriculum 2005.

Spady remembered that Rensburg opened the discussion and his guidance at best was minimal. Spady claimed that Rensburg said: "Well, I don't know what we're supposed to do right now. I don't know if there's anything really important we should talk about or not. Uh, do any of you have any ideas?" The discussion lasted an hour and a half and consisted of "pointless nothings." In Spady's mind, the entire goal of the pointless nothings was to get to lunch: "Lunch is always the major goal!" After lunch, only half of the audience remained and the ensuing discussion lasted for another 45 minutes, and they all decided to leave the disastrous presentation.

Spady had a flight to catch just after the presentation. He had arranged to meet with Asmal to tell him about the meeting and decide on the next steps to help implement Curriculum 2005. Parker and Spady would drive into Pretoria to the National Department with Asmal and his armed guards to quickly debrief him about the meeting, and then Asmal's guards would take Spady to the airport. Spady remembered the ride:

> We get in the car. The door closes. The guard guys start driving. We are barely into the first little loop, and he said: Well, what happened on Saturday after I left? We both simultaneously and unrehearsed say: Nothing. We just said: Nothing. And he said: Nothing? What do you mean by nothing? We said: Nothing, nothing happened. He said: What do you mean nothing happened? We both just said: There was no meaningful discussion. Everything was random. Nothing happened. And the man went – we weren't even through the loops. We weren't even on the highway. And he went: Oh, my God, what am I going to do? (W.G. Spady, interview, June 14, 2010)

Spady recalled Asmal clutching his head. Spady said that even the Minister of Education could not "control the bureaucracy and the inertia" in South Africa. Spady claimed that in South Africa, "it was very much a case of they wanted advice, *and* they wanted to do everything themselves." The new government wanted to prove itself. However, according

to Spady, that need was so desperate that it led to "closed-mindedness" even though

everyone was claiming that they wanted help and guidance.

In the meantime, the politics had changed, and Spady's strong allies in the

Western Cape had been replaced by Zille. Spady said: "That ended everything." The

South African Department of Education reviewed OBE after that ill-received presentation

by Spady, and in the review of OBE the entire concept of exit outcomes got jettisoned,

and Spady was no longer the "international expert." He was removed from the process by

the "Queens of Content" at the National Department. They ended up embracing subject

areas and content to the detriment of outcomes and competencies.

Spady believed that educentrism was even more entrenched in South Africa than

the U.S. Spady also saw the difficulty in implementing a national curriculum. He recalled:

> The South African thing was a national initiative, and so everybody was taking
> orders from the National Department. Whatever they decided is what you were
> supposed to do. Everybody was deathly afraid of them, and I kept advocating…
> They just absolutely were not quite ready yet. They absolutely didn't have the
> personnel or whatever. I mean, schools spread all over the country. They used to
> have this rigid inspectorial system. It was the Afrikaans' way of operating, but the
> National Department couldn't possibly monitor and make good things happen
> anywhere. It was just that they were overwhelmed with things to do which was
> unfortunate. When you try to run a national system out of a central office in
> Pretoria and make everybody do the right thing, it doesn't happen. (W.G. Spady,
> interview, June 15, 2010)

Spady believed that the National Department of Education didn't have the requisite

personnel to be able to "to run a national system out of a central office." Additionally,

Spady claimed that the National Department lacked integrity.

Before Spady arrived for his first tour in 1997, he was given the first draft of

Curriculum 2005. He recalled filling the paper with red ink, and he sent it back to the

National Department of Education. Months later, the Department sent a second draft to

Spady. There were the "same typos, same mimeographed stuff, crooked on the page, all

the stuff that had been in Draft One." He found out that the document had been circulated

for months but because "the ultimate imperative in African culture" is that "everybody

has to be consulted" that the paper would end up virtually unchanged. Spady said that it

would just be printed on different colored paper: "green paper instead of white paper."

Spady believed that he also could not penetrate the bureaucracy and the rigidity at the

South African Department of Education. He called the Department "a black hole of

mystery."

In 1999 when Spady was conducting the three-week intensive training of OBE

trainers for Matlock and Collier, he decided to revisit the Twelve Critical Outcomes. He

believed that if he could "take the essence of what was in these 12 statements and unpack

it and reframe it right" and express the statements in role performer language with

adjectives and a noun he may have something of value to re-build Curriculum 2005

around transformational OBE. In early 2004, a frustrated Spady sent an article that

included this new framework for Curriculum 2005 to *Perspectives in Education*, a

prestigious scholarly journal at the University of Pretoria. He recalled his disappointment:

> I never received a single comment from a single soul that it was ever read. I tried
> to do my absolute best. If you started with this and you really looked deeper at
> what's implied, what could it become? What about this? What about that? You
> could end up with something like this. The faculty members at the University of
> Pretoria, I mean, God, I got instant friends all over the place for doing this even
> though their dean didn't like Curriculum 2005, Jonathan Jansen, but it was like I'm
> going to give this my best shot. [It's] better that I put this out there, and at least
> [better] having it be there than sitting in my notes in my files. I mean, that's not
> doing anybody any good. (W.G. Spady, interview, June 14, 2010)

Out of the original Twelve Critical Outcomes, Spady had redeveloped a framework of five life role outcomes: "One was to be about entrepreneurs, and one would be about active citizens, and da, da, da." Spady thought that he could still preserve Curriculum 2005 as a curriculum based on outcomes rather than subject areas or content, but that was not to be.

For Spady, the curriculum actually posed a minor problem in South African education compared to the lack of resources and the interest in teacher control. When Spady first met Collier, Collier taught at a top flight public high school in Port Elizabeth. According to Spady, the facility would be third tier or below in the U.S. in terms of an adequate facility and resources. Millions of dollars were poured into lavish high schools in the U.S. suburbs; however, every school in South Africa was made of "pumice block in rectangles." Additionally, Spady witnessed the rudest behavior exhibited toward children especially by Afrikaner adults. Spady saw school secretaries reduce little girls to tears for the smallest and most insignificant things, such as forgetting to bring a water bottle.

Spady presented at a retreat at the elite girls' school where his wife taught in Port Elizabeth. The retreat was about making the school a better place, and the girls and faculty were discussing the school's good thing and bad things. Spady was amazed to hear that one of the worst things was: "Girls whispering while walking in line to their next class." For Spady, education in South Africa boiled down to "teacher control versus learner empowerment." Spady claimed that the whole culture was about dominance and control:

> That was in everybody's blood. Teachers didn't know how not to do dominance
> and control. Black teachers didn't know how not to do dominance and control. I
> got there and found out beating students was a norm if they didn't behave. You
> could beat them, okay? Everybody thought that's what discipline meant, and in
> the black community--it is legendary--tons of principals and tons of teachers come
> to work drunk or don't come to work at all. [There are] levels of dysfunction and
> pathology that we know nothing about. (W.G. Spady, interview, June 14, 2010)

This interest in dominance and control shocked Spady because he was socialized into his

professional role and identity and value system at the University of Chicago "where

everything is rational and everything is perfect and intellectual integrity counts the most."

For Spady, Chicago represented an ideal. To his dismay, he discovered that the rest of the

world wasn't the University of Chicago.

Spady told a story that he felt was emblematic of what he perceived as the South

African mindset in relation to dominance and control. He was sitting in the Durban

Airport one day waiting to fly back to Port Elizabeth, and a public address announcement

comes on to remind travelers about the no-smoking laws that were recently enacted in

South Africa. A voice comes on the speaker. It was a young man's soothing voice:

"Durban International Airport has become a no-smoking airport. Anyone found smoking

will be *persecuted* to the full extent of the law." Spady thought: "Oh, how appropriate!"

The recording came on several more times so Spady could check if he was really hearing

what he thought he was hearing: "Oh, yes, they were all be *persecuted* to the full extent of

the law! That's how we do it over here!"

Spady related another experience in South Africa where he was invited by an

NGO that was working on developing early childhood education. They were training poor

black women from the townships how to run nursery schools. The NGO wanted Spady to

discuss OBE with these women. Spady knew little about nursery schools, but his

presentation was preceded by a colleague of these women who had attended the National

Department of Education's Cascading Program which was an OBE train-the trainers

program. She was going to explain OBE to these women. She ended up filling the

blackboard with the "most convoluted, mixed-up, incomprehensible junk" while doing

the whole presentation in English while the women there only spoke Xhosa. Spady

witnessed an absolute disconnect.

 After telling this story, Spady offered his South African definition of

"transformation":

> The South African definition of 'transformation' is not transformational OBE. It
> is that blacks are going to get way better educated than before, and we're not going
> to have mandatory national Christian education in the curriculum. That is what
> 'transformation' means. It doesn't mean anything about: We're going to really
> rethink the subject areas and all this stuff. Their academic establishment over
> there wields considerable power, university level as well as their provincial
> departments of education which control everything, and [it] is a centralized
> system.
> Here are these people out in the total boondocks. You can't even get there
> on a road, and they're afraid of doing anything because the National Department
> might not like it. That's the climate under which everything operated in that
> country for 30 years, total national oppression and control over everything or else.
> So, you have a new government, and you say: Okay, we're all going to be
> liberated, and we're all going to do all this stuff, and guess what: They just keep
> doing what they know how to do. They changed the color of the oppressors. Or
> they made it more mixed than pure white. I mean that's the dynamic, the context
> that I discovered. They were content obsessed. (W.G. Spady, interview, June 14,
> 2010)

Spady realized that "transformational" in South Africa at that time had little to do with

rethinking subject areas: "They were content obsessed." He regretted that he didn't "pick

up soon enough on [what] their word 'transformational' meant."

In his 2007 paper, "It's Time to End the Decade of Confusion about OBE in South Africa," Spady admitted that transformation for South Africa actually meant the move from apartheid to democracy. The National Department was not much interested in transforming education from a time-bound, content-oriented system to Spady's new model. The Department merely needed a tag for educational change to show that something was occurring, and "transformational" meant that that something was good.

Nevertheless, according to Spady, the South African "blacks" responded favorably to OBE because they saw it as their "educational salvation." After his presentations, they would want to present Spady with gifts. Spady asked them to sing for him:

> Spontaneously they knew [the songs]. Somebody would sing two notes of something, and they all would know the song. These were all songs in Xhosa, and they would break into this amazing harmony. They would sing these songs, and I would just stand there and cry. All I wanted to do was just hear them sing…They just knew what to do and [in] East London, they even tried to invent an OBE song, spontaneously: OBE, da, da, da. It's like oh, my God, this is crazy. (W.G. Spady, interview, June 14, 2010)

Spady would return to South Africa to nurture his HeartLight learning community in Port Elizabeth, but his involvement with Curriculum 2005 was finished.

Australia

The Association for Supervision and Curriculum Development (ASCD) magazine, an internationally recognized publication, had defined Spady as "Mr. OBE" in the 1980s. Australian educators knew of Spady and his reputation through his literature on OBE, especially his articles published in *Educational Leadership*. At the ASCD national conference in 1992, Spady did a major presentation on OBE, finished, and went into the men's room. In the men's room, Spady met the Executive Director of ASCD in

Australia who invited him for a lecture tour of the continent. In September of 1992,

Spady's whirlwind tour took him to Melbourne where he was interviewed on national

radio. He presented in Brisbane, in the Sydney area, and in Canberra, the capital city. The

1992 lecture tour defined Spady "as the guy who really knew about outcomes" and laid

the groundwork for subsequent visits to Australia.

Spady worked with a group of women from the Northern Territory in the early

2000s who were interested in transformational OBE, and during the first trip to work with

them, Spady did some consulting with the Catholic schools in Queensland. The word

about Spady and OBE spread throughout the Catholic schools in the country, and he was

invited to Perth in Western Australia and Queensland to present to Catholic teachers. In

2003, Spady met the Director of the Catholic schools in Queensland who invited him to

present at a faculty development event. Spady recalled the presentation:

> They had 5,000 teachers all come to this basketball stadium. I was the major
> speaker…That was probably the biggest audience I ever addressed…It was a good
> experience for me. It was a challenging experience…I put out ideas that they
> certainly weren't all familiar with, but I always tried to make this appealing and
> understandable, and [that's] what really matters when you try to do this sort of
> thing. (W.G. Spady, interview, June 15, 2010)

The Catholic teachers "fell in love" with Spady's five "Cs" (conscious, creative,

collaborative, competent, and compassionate), the adjectives used to describe the

qualitative attributes of the role performer labels in transformational OBE. The teachers

wanted to build an outcome framework around Spady's five "Cs" because "it just

captured their sense of both the moral and the intellectual agenda of what education

should be about." Spady traveled the east coast of Australia in Queensland from town to

town, introducing the five "Cs" to the administration in Catholic school after Catholic

school.

Spady's closest connection to having any influence on public education in South

Australia was in vision building around outcomes in Adelaide. In 2005, he also met with

a commission in Queensland who were seriously looking at "redefining learning systems"

statewide, and they were interested in transformational OBE. At an unofficial meeting,

the commission and Spady built a "compelling and interesting role performer" framework

around the five "Cs" for their school systems. The commission continued to move OBE

forward; however, according to Spady, politics proved to be a stumbling block:

> Everything is governed by politics. Whenever you have an election and a new
> regime comes in, then they want to clean house. It doesn't matter what you're
> doing. It doesn't matter how good anything is. They all just feel compelled to
> have to just do their shtick. That's what happened in Queensland. Just as we were
> really building momentum all over the place, there was a new election, and some
> labor guy got appointed to be the Minister of Education. (W.G. Spady, interview,
> June 15, 2010)

In 2006, one of the women from the Northern Territory served on the program

committee for a national conference in Alice Springs held within a few hours drive of

Uluru or known popularly as Ayers Rock. Spady appeared as a keynote speaker. Father

Michael Lapsley also presented. He was an apartheid-era activist in South Africa who

sustained debilitating injuries as a result of a letter bombing. Spady gave a major speech,

and facilitated two breakouts at the conference. He was gathering support and had

articles published in a national magazine, but the opportunity to bring in outside

consultants dried up with money woes in the private and public educational sectors in

Australia.

After his time in Australia, Spady saw one great difference between education in Australia and education in post-apartheid South Africa. The National Department ran South African education. According to Spady:

> Australia was much more state-determined. There could be national policy that influenced that somewhat, but these were state-run. The closest connections I had were in Queensland and then really in South Australia toward the end of my time there. There was a lot of enthusiasm about [OBE]. (W.G. Spady, interview, June 15, 2010)

However, very much like South Africa, Spady said that in Australia, while he met some "real visionaries and the leaders and the learner-centered people who really want[ed] to make a difference and do good," that these individuals were up against the "political machinery" and educentrism. He asked:

> Now is Scotland doing OBE? No, they're doing CBO. Is anybody in Australia doing OBE? No, only a couple of states in Queensland, okay? And all my friends there couldn't fight the official bureaucracy. They couldn't fight the fact that a new guy got put in as the Secretary of Education or whatever it was. He just had some other stupid agenda…Because everybody is in love with: You got to get them to university, and that's what really counts. (W.G. Spady, interview, June 15, 2010)

Spady saw K-12 education as a way to prepare young people for life performance roles. In Australia, as in South Africa and the U.S., the traditionalists were unable to see beyond K-12 education being a credentialing device for university admission.

CHAPTER SIX

BACK IN THE USA

HeartLight Foundation

In 1997, Spady discovered the book *Conversations with God: An Uncommon*

Dialogue written by Neale Donald Walsch in 1996. Spady saw Walsch's book as "so

counter-intuitive and counter-rational from everything I had been taught from Sunday

school on via Christianity." He said that "his mind was blown." According to Spady,

Conversations with God consisted of three books. The first book consisted of a dialogue

between God and Walsch about the nature of the soul. *Conversations with God: Book*

Two, written in 1997, discussed the social institutions people have created on earth and

why they were now broken. Spady remembered reading the second book in the series and

its effect on him:

> Chapter Eight and Chapter Nine are about education. The dialogue back and forth
> about education focuses an awful lot on Maria Montessori and Rudolph Steiner as
> being the exemplars/manifesters of the kind of education we need, and then it
> turns into this discussion of all the people who dislike this and hate this and are
> opposed to this. It's like, oh, shit, because it's describing the Far Right attacks on
> OBE, and I am afraid to turn the page because I'm going to see my name. My
> name wasn't there, but the whole deal was. It's like oh, my God. (W.G. Spady,
> interview, June 14, 2010)

In the fall of 1998, Spady was consulting for the Detroit schools when he heard that

Walsch was coming to Detroit to speak at a local church. A friend of his attended the

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presentation by Walsch and bought Spady a copy of 1998's *Conversations with God:*

Book Three. Spady devoured it.

According to Spady, "*Book Three* is about the greater cosmology, how the whole

universe is sort of put together." When Spady got to the epilogue, he was halfway down

the first page when he heard a voice say two words:

> The two words were *total learners*. It's like, oh, shit, of course. How can you be a
> total leader if you're not a total learner? Then, it starts coming because: How you
> lead is how you live is how you learn is how you live. Oh, my God, so it's *total
> living*, and it's *total learning*…It was probably 8:30 AM, and I started writing and
> I started building frameworks, what really underlies *Total Leaders* and total
> learning…There's the inner learner, and then there's the creative leader. I'm
> inventing these labels. I'm writing tag lines, the essence lines, and then I'm writing
> other stuff. I finished about 11 o'clock, and I had three pages full of stuff. (W.G.
> Spady, interview, June 14, 2010)

These "three pages full of stuff" about total living and total learning, inspired by *Book*

Three, became the basis of Spady's 1998 book with Charles J. Schwahn, *Total Leaders:*

Applying the Best Future-Focused Change Strategies to Education.

Spady's sister, Sha, gave him Walsch's 1999 book, *Friendship with God*, for

Christmas. Spady claimed that this book explained concepts like "there is no time and

why relativity is necessary in order for us to have reality on this plane." In 2000, he

returned from South Africa to find Walsch's latest book *Communion with God*. He

explained:

> The book is not a dialogue. It is a straight download from God. Neale simply
> types. It is about the ten illusions of humans. The ten illusions of humans are these
> ten beliefs we have created for ourselves in order to justify living the way we live
> on the planet with each other for which we have built all these elaborate rationales
> and religions and everything else, and every one of the ten is not true. Every
> chapter is a chapter about the illusion: where the illusion came from, how it
> manifests, what we could do about it, what its antidotes are. It's just thorough,

> thorough, thorough, thorough, and unbelievably clear. I'm reading this and it's like: Oh, my God! This is just amazing stuff. (W.G. Spady, interview, June 14, 2010)

Spady said that *Communion with God* had an epilogue, and in the epilogue Walsch explained that he had created a school in Ashland, Oregon that embodied the ideas in *Conversations with God*, *Friendship with God*, and *Communion with God*. The school was called HeartLight, and Walsch wanted to expand the model to other locations. Walsch listed a phone number. Spady was very excited by the prospect:

> I register that, and it's like: They're going to do something in education…So, I write a letter: Dear Mr. Walsch, I've done all this stuff in education and on and on, and I'm world famous. Here is my CV, and I want to do the HeartLight thing. I send it off, and I hear nothing. I hear nothing some more, and then I hear more nothing…This is 2001. I called the magic phone number. No answer. I called the magic phone number again. No answer. The timeline is getting shorter and shorter and shorter. (W.G. Spady, interview, June 14, 2010)

At the time, Spady was preparing to visit Canada to work with Ian Jukes, who wrote the forward to Spady's 2001 book *Beyond Counterfeit Reforms*. Spady was also planning another tour of Australia. However, he was desperate to meet Walsch and to see what HeartLight was all about. A young man named Peter finally returned his call and invited Spady to a symposium in August of 2001.

The symposium opened on a Friday with a presentation by Walsch. According to Spady, Walsch was a powerful speaker:

> He gives this incredible address, just amazing presenter. Here is Mr. Presenter watching a first rate presenter present, and just saying: Oh, man, this guy is really good. He is really wonderful. He made this comment about: I think the most important thing that we have to teach in these HeartLight schools are these three fundamental things. These are the three…The most important thing we have to teach is this. That was one of the things he said. My brain said: I don't think that's true. (W.G. Spady, interview, June 14, 2010)

Spady introduced himself to Walsch during a break after his presentation. Spady told

Walsch that he had read all of his books and that Walsch was wrong about the

fundamental things that should be taught in a HeartLight school.

Spady believed that the most important things to teach in a HeartLight curriculum

were the ten illusions from Walsch's *Communion with God*, "how we are trapped in these

ten illusions, and we need to get past the ten." Spady was surprised to find that Walsch

suddenly agreed with Spady about the ten illusions and the curriculum. Walsch returned

to the stage for a question and answer session, and Spady remembered his response to the

ensuing discussion:

> We get going into this dialogue. It all gets going. Finally, it's just like I can't stand it anymore so I raise my hand, and he calls on me. I said: I think the biggest mistake we can make is to call these HeartLight [places] 'schools' because the word 'school' is just all about in-the-box stuff, and we do not want to be in-the-box. We do not want to be schools. What we need to do is call these HeartLight 'learning communities.' (W.G. Spady, interview, June 14, 2010)

Spady was surprised again to see Walsch agree with him. Walsch said: "We're going to

do that! That's right. You're right!"

After the Friday night presentation ended, Walsch told Spady that he will probably

enjoy Saturday's events, but Walsch won't be there. Walsch's wife, Nancy, would

moderate the presentations. Spady told Walsch:

> Neale, you cannot *not* be here tomorrow. These people have no idea what they're doing. They need you. They need your presence, and they need your input to give this grounding because right now this is just going to go all over the place and [will] go nowhere. I'll be there, he said. (W.G. Spady, interview, June 14, 2010)

Spady returned to his hotel room and told his sister, Sha, about his three challenges to Walsch and Walsch's acquiescence. The next day, Walsch was at the symposium.

On Saturday, the participants formed groups to plan the HeartLight learning communities. Spady told Walsch: "Neale, in my work 'why' drives 'what' drives 'how.' If you don't know why, then you don't know what. And, if you don't know what, you sure don't know how."

Walsch shouted to the assembly: "People, people, people, 'why' drives 'what' drives 'how.' We cannot go off into groups if we're going to discuss how when we don't know what and we don't know why!" For Spady, that was one of the "high points" of the day because Spady's influence got "everything refocused" according to the first principle of OBE: design down.

Walsch asked everyone to write aspirations on sheets of paper to be hung on the wall. Spady wrote: "To lead the transformation of education in the world using this model." Spady also insisted that his group discuss outcomes: What were they going to learn at the HeartLight learning communities? What were the students going to be able to do after completion of the learning experiences? Spady was very disappointed with the dynamic even though Walsch was a part of his group:

> Neale signs up for my group, and then this whole thing: Somebody should get Chinese food, and then we can keep working. Fine. Neale goes out for the Chinese food and doesn't come [back] to my group. These people are there romantically talking about this and that. It's like, oh, my God. We finish this hour and a half discussion with virtually nothing accomplished. Nobody gets what I'm talking about. Neale wasn't there because he went to get the Chinese food! (W.G. Spady, interview, June 14, 2010)

Walsch wasn't there to help focus the group, and the group didn't understand what Spady was discussing.

After the meal, the groups attempted to build a model for the HeartLight learning communities out of all of the sheets of paper tacked to the walls. Spady remembered his feelings of hopelessness:

> It's just more absolute complete chaos, needless to say, none of which makes any sense, none of which is coherent. I'm doing my stuff. I'm beating myself up. I'm beating them up, and I go into the doldrums like you can't believe. (W.G. Spady, interview, June 14, 2010)

Finally, Spady bumped into a doctor standing in the hall after the session ended. His name was Ken Miller. Spady "marched" Miller into the room, and Spady angrily pointed at the statement that he had written earlier on his sheet of paper affixed to the wall: "To lead the transformation of education in the world using this model." Spady said to Miller: "That is never going to happen, and I don't even want to be here. This is an absolute mess!"

Spady had earlier presented Walsch with an autographed copy of *Beyond Counterfeit Reforms*. Walsch, in turn, had signed some of his books for Spady. Even though, Spady felt that the whole weekend was ending on an "incredible downer." Spady returned to his room, and told his sister, Sha, that the day was "just awful." Spady recalled her saying: "Well, what could you expect? Half the people here have bare feet, long hair, and are under 20. Then there's you! What do you expect?" She left because "it was so bad." Spady said that she couldn't "handle all this intense negative energy stuff." Sha spent the rest of the weekend "roaming the forests of Ashland."

The next day, Spady agreed to breakfast with a colleague from New York and return to the HeartLight meeting for the final session. Spady was reluctant to attend because the objective of this final session was to decide on the model for the HeartLight learning communities and the individuals who would be charged with implementing the model. Just before the session, Spady peeked into the meeting room. Walsch saw Spady and called him over. Walsch told Spady: "I read your book last night and of all the things I've ever read in education this is the most brilliant thing I've ever read." Walsch decided that Spady would be a part of a three person team to lead the initiative and "move it forward." Walsch brought Spady into the meeting.

First, Walsch announced that Ken Miller would lead the team. He was the doctor that Spady had pulled aside to say that the whole session was "an absolute mess." The second person called to the stage was Deborah Oliff. Spady remembered how Walsch introduced him:

> He launches into this long discourse about sometimes people bring great value that we don't immediately see. We need to look at the depth of this and that and do research. It's all this circuitous and whatever and whatever and whatever. Then, he says: That's why I want Bill Spady to be our whatever-he-said, okay? Research director of all our work or something like that…For all they knew about me, I was just a guy continually saying this isn't the way to do this. But, he got it! (W.G. Spady, interview, June 14, 2010)

Spady had lunch with Walsch where Walsch iterated: "I think you're the smartest person I've ever met in my life." Walsch said that they would soon meet to formalize an agreement at Walsch's home.

Miller, Orloff and Spady met the next morning at a coffee shop in Ashland. They attempted to map out the next steps toward implementation of the HeartLight curriculum.

Spady offered his OBE pyramid that he introduced in 1994. He reformulated the five

steps of the OBE pyramid into five questions that he asked Miller and Orloff: "What's the

paradigm? What are the purposes? What are the premises? What are the principles? What

are the practices?" The three used these questions and their knowledge of Walsch's books

to guide their initial plans for the HeartLight learning communities.

They drove to Walsch's home with half of the curriculum model written on a

napkin. Walsch couldn't meet with them because he had a deadline that day with his

publisher. If he didn't have everything submitted to his publisher by 11:00 A.M. that

morning, his next book wouldn't be published. Miller and Orloff helped Walsch complete

his book while Spady tweaked the model. Spady remembered Walsch's reaction to the

model:

> They come out at 11 o'clock. [Walsch] has done his thing. I [give him the model],
> and he just shits his pants because it was his work and my work…The five 'Cs'
> [conscious, creative, collaborative, competent, and compassionate] were the glue
> that held the whole thing together. He was blown away. I said: Okay, I volunteer.
> I will write a document for us that represents the model that explains it and
> basically defines the HeartLight model. We'll circulate it to all our people and see
> what they think. (W.G. Spady, interview, June 14, 2010)

They distributed the model to the others from the weekend session in Ashland, and Spady

soon authored a strategic plan. However, Spady believed that they would not be able to

implement the plan because of the lack of money to support it. Within months, Oliff and

Miller stepped down, and Spady was the last one standing.

Spady and Walsch continued to work on developing the curriculum. One day,

Spady arrived at Walsch's home to work on a book that would herald the HeartLight

learning communities. Spady certainly believed that Walsch was "a very smart man."

However, there were large-scale "disputes" between Spady and Walsch "about how much can we really posture this book in terms of some of the profound depth, spiritual depth that is in his books, that is just not going to be accepted as okay." Spady was fearful that those individuals not unaccustomed to the *Conversation with God* series, *Friendship with God*, and *Communion with God* may misunderstand or not be prepared for HeartLight and its mission.

Spady and Walsch found themselves "arguing about the most fundamental premise in…all the work." According to Spady, Walsch claimed in some of his work that humans were spiritual beings with a possible connection to extraterrestrials. Spady determined a way to massage the message for public consumption. The statement he arrived at was: "We are spiritual beings manifesting as humans." Spady said that Walsch was very upset. Walsch blurted: "Goddamn it! The statement is: We are God! I said: Yeah, Neale, let's put 'we are God' in there and see how that sounds, okay? I mean, we're at each other."

Nevertheless, Spady called a meeting at his mother's house outside of Portland on a Sunday afternoon. Walsch didn't attend the meeting, but many of the original Ashland session participants were present. Spady complained that everyone wanted to be either a major "player" or a critic, and he was "sick and tired of the bitching and moaning." He forced these individuals to parse the elements of the model word for word. If anything needed to be changed or if anything needed to be improved, Spady wanted to know. They "massaged a few things and had the model." Spady was to meet some of the HeartLight staff members on the next Friday afternoon, and he thought it was going to be

a significant meeting. However, it convened for "about ten minutes." They all said they

had to go home. They disappeared, but Spady was told to show up at Walsch's home the

next morning for a meeting.

Spady and his wife, Pam, arrived at 9 o'clock the next morning at Walsch's house.

The board of directors of the HeartLight Foundation attended the meeting. The group

included the financial director of the foundation. Walsch had severe bronchitis, and he

could hardly talk. He announced to Spady that "a fellow has stepped in the picture and

donated a million dollars to move this forward. This is yours! The question is: Do you

want to do this inside of our foundation or do you want to do this independently?"

Walsch was giving Spady free rein to implement the HeartLight curriculum and to build

the HeartLight learning communities. Spady recalled his reaction to this opportunity:

> There had been all kinds of very unfortunate rancor between Ken Miller and the
> foundation staff and the other staff members. They didn't like him. They didn't
> like his style. Who is this interloper? I had already given this some thought, and I
> was just befuddled. I didn't know what to say because I didn't know what the right
> answer was. I didn't know how people were going to take it. [Walsch] was sitting
> over there in this chair he always sits in, and Pam was next to him. There was
> somebody else, and then there was me as we go around the circle. He just leans
> over, and he said: Decide. What do you want? It doesn't matter, okay? It's not
> going to hurt anybody's feelings. Just decide. Okay! I said: I'll do it outside. Fine,
> settled, done. You've laid out the strategic plan; form a board; do this; do that; go!
> (W.G. Spady, interview, June 14, 2010)

Spady created HeartLight International to move this initiative forward quickly. His wife

and children returned to Port Elizabeth with the charge to create a HeartLight learning

community in South Africa. Some individuals in the northern suburbs of Chicago also

wanted to create a HeartLight learning community. Additionally, a group in Ohio were

interested in building a learning community around Spady's HeartLight curriculum based on Spady's five "Cs" and Walsch's books.

However, the only HeartLight learning community that ever materialized that could attract enough students was the one in Port Elizabeth. A man named John Ryan, who was the husband of Pam's best friend over in South Africa, managed to buy a site "dirt cheap," sandwiched between Port Elizabeth's priciest neighborhood and a black township. Two nearby bus lines made it accessible to the people in the black township which served to integrate the school.

In June of 2003, Walsch organized a gigantic event in the Portland area to launch an initiative called Humanity's Team. He was creating an international organization that would communicate his philosophy to a world-wide audience. Over 900 people attended the event. At the same time, HeartLight International or, more specifically HeartLight South Africa, was rupturing internally because the donor refused to add any more funding. The donor's name was James Colen. Spady called him "ferociously bright." Colen was a Harvard graduate and a professional gambler who had made over 40 million dollars on the stock market, and he wanted to give back to the community. He discovered Walsch's books, and he was so impressed that he gave one million dollars to HeartLight International. That was Spady's original stake. However, according to Spady, Colen's portfolio suffered during some upheaval in the stock market. He got frightened, and he decided not to fund HeartLight any longer.

Spady was on the verge of shutting HeartLight International down at the same time that Walsch was holding this event around launching Humanity's Team. Spady

wanted HeartLight to be more than "establishing a little school here and establishing a

little school there." He wanted HeartLight "to be something more." For Spady:

> It was about transforming a way of educating! My vision once again was way
> bigger than whatever, and the guy with the money wanted the little schools. I
> wanted the big thing…and the board of directors basically supported him. (W.G.
> Spady, interview, June 14, 2010)

Colen's vision of opening local HeartLight schools here and there trumped Spady's

global vision of transforming education across the board.

Nevertheless, Walsch gave Spady and Colen fifteen minutes each at the event to

tell the audience tell about HeartLight because it could be a part of what Humanity's

Team would be doing. Spady remembered the event:

> So Jim [Colen] got up there and talked about how he was motivated to do this and
> what he wanted to accomplish. That took about three minutes. I said: Well, here is
> what we've done. We've done this. We've developed this model. We've got a
> school operating in South Africa. We've got all these things happening in
> Australia. There were people all over the block wanted to do stuff over there.
> We've got this possibility and this and this one here in the States. That's what
> we've been doing the last two years. I got a screaming, standing ovation that went
> on and on and on. It's like, holy shit, knowing that the next day at our board
> meeting we were going to close the whole damn thing down! How is that? The
> crowd is still screaming. (W.G. Spady, interview, June 14, 2010)

Lack of funding became the issue for HeartLight in the U.S. as well. The proposed local

HeartLight schools outside of Chicago and Toledo couldn't generate enough attendance to

even open their doors, and once Colen stopped the funding, the schools were shuttered.

Although Spady praised his curriculum and the school in Port Elizabeth at

Walsch's event, Spady admitted that HeartLight South Africa "didn't do the model." He

recalled what actually occurred:

> It was a messy, imperfect situation from the very start. The model did not operate [with] integrity. It was guided by powerful pieces of paper that were not implemented. [The staff] would wait for me to come to town to write the next great piece of paper that defined the next great thing they were going to do… It is part of the very thing that I disagreed with at that meeting when I first met Neale, that workshop thing they had, that symposium. (W.G. Spady, interview, June 14, 2010)

Spady compared the situation with the staff at HeartLight to Walsch's weekend sessions in Ashland where the curriculum was originally developed by Spady. Whether in Ashland or Port Elizabeth, Spady believed that everyone was standing around waiting for him to move things forward.

Spady approved that the HeartLight school embraced learning centered pedagogy and valued one-on-one sessions with the students, but he believed that the curriculum lacked depth. He said that it was learner-centered, but it had no substance:

> It was kind of: Whatever the kids want to do is just fine because we're empowering the kids to make decisions. These African students went from being told, forced, compelled to do everything -- even when to breathe--which they hated, which is why they wanted an alternative, which is why they came to [HeartLight]. Their lives went from that to: Okay, well, here we are! It took a long time for it to sink in. What they loved about the school was the freedom and flexibility that it provided, but there was an awful lot of profoundly unstructured stuff that could have been turned into a deeper learning experience. (W.G. Spady, interview, June 14, 2010)

For example, the woman who was the principal of the school in Port Elizabeth was enamored by permaculture. Spady explained that permaculture was a sustainability method popularized in Australia. The school had enough room to design gardens and to create a natural permaculture site. This was going to be one of the highlights of the school. Spady recalled that perception of the school did not reflect what was actually happening:

Some of the kids didn't like to get their hands dirty, and some of the kids didn't want to pick weeds, so they didn't. The whole thing just didn't materialize. On paper, God, we were the permaculture champions of South Africa. In reality, the thing kind of got half-done and then just bogged down because nobody wanted to say there is a set of principles and a set of priorities here that really matter. Instead, flexibility won out over any semblance of: There are really some things you have to do around here if you're going to be part of this learning community. (W.G. Spady, interview, June 14, 2010)

Spady said that the school lacked integrity. Whenever he arrived in town, he would see integrity on paper but not in substance. For example, Spady and the staff invented an assessment system with both staff assessment and student self-assessment around a set of priorities and criteria inspired by Spady's five "Cs" and Walsch's philosophy. The school implemented it one or two grading periods.

HeartLight International actually existed only through HeartLight South Africa. At one point, Spady wanted to establish HeartLight schools in Cape Town as well Pieter Maritzburg or Durban in the Kwasi-Natal area. That never happened, but Spady's people operated the HeartLight learning community in Port Elizabeth for two years. Then, after the funding dried up, the school couldn't sustain without that support. When the Port Elizabeth school closed, Spady and Ryan formed a new board of directors. They decided to carry the HeartLight mission forward under a new label. Spady's friend, Muavia Gallie had made some national contacts, and a possibility arose. The African National Congress wanted leadership training, and it had a national team of distinguished people visit the Port Elizabeth school in the fall of 2003. Spady recalled their amazement:

I did this mini-seminar over our dining room table with a little white board and laid some of this stuff out. These people were utterly blown away, but none of this ever materialized. I mean, we're sitting there; [Muavia's] got contacts with everybody in the world. We have meetings with all these people. There's all this:

> Oh, we need this; we need this; we need this! I spent two years writing proposals and developing plans and developing programs. Not one single thing got funded. Nobody ever followed through on anything. (W.G. Spady, interview, June 14, 2010)

Because nobody followed through, Spady went from the highest high of having this national possibility to the low of the initiative fizzling out through lack of funding and follow through.

The school closed in January of 2004. Pam and Spady ended their marriage in May of 2005. Spady had little reason to stay in South Africa. He was tired of standing "in line with my hat out waiting for these folks to get their act together." After years of trying to produce educational change in South Africa, Spady was done, except for one thing. John Ryan was still running the HeartLight site in Port Elizabeth in 2010, serving the black community by offering things such as entrepreneurial courses in getting a driver's license. Ryan managed the school and the finances, using money from a trust fund Spady set up.

Spady said that Ryan had "just poured his heart and soul into it," and the site had "touched the lives of 2,000 people in that township and helped them in some way. That's good on an absolute shoestring budget. When you care and you're committed, good stuff can happen." Spady applauded Ryan and his work:

> So Bravo to John. The site is still functioning, and the foundation is still there. In fact, we've got a plan to subdivide the property. The municipality has agreed on the plan, so about two-thirds of it where the main structure is will still exist for us. We'll sell the back third. That will generate a whole bunch of revenue that will allow this thing to go on for a long time...In this way they can generate a whole big chunk of money that really allows them to expand and promote more what they're doing in the main facility there. (W.G. Spady, interview, June 15, 2010)

Spady's original vision for HeartLight International had been scaled down from the transformation of education globally to the transformation of a township.

New Possibilities Network

After the South African experiences, Spady's attention turned to the U.S. because of his "profound frustration" with the standards movement, which according to Spady was characterized by the No Child Left Behind Act (NCLB). In the fall of 2006, Spady wrote an article titled "The Paradigm Trap" that was published in *Education Week* in January of 2007. The article criticized the NCLB and the reform movement, "saying that it was nothing but us stuck in an old industrial age paradigm." The article featured an illustration of a child curled up in fetal position in a box. Spady included his e-mail address. He started to receive e-mails that were "very positive, very encouraging: Way to go! This needs to be said!"

Ron Brandt contacted Spady as a result of the article. He urged him to get in touch with Renata and Geoffrey Caine because Brandt believed that their work paralleled Spady's. The article and Spady's burgeoning relationship with the Caines led to Spady being identified with a network of people that had already been established who were against NCLB. He remembered their passion: "What they stood for was: We hate NCLB! Well, then what? It's like, okay: Tell me the rest. They were of course learner-centered people and whatever, but there was no coherent anything." Spady was interested in bring coherence to the network.

Phillip Kovacs of the University of Alabama in Huntsville coordinated the first efforts. He distributed a petition challenging NCLB that gathered 50,000 signatures.

Spady began a correspondence with Kovacs, and he found that this network was holding

a conference in Atlanta. Spady wanted to hear what these people had to say, and he

considered being a contributor in some way to the network. He attended the conference in

Atlanta where he met Marion Brady, an influential educator from Florida and Susan

O'Hannion, who Spady called "the most rabid of the opponents of NCLB." Spady also

met "a remarkable guy who was a middle school teacher and a blogger named Ken

Bernstein."

After making these contacts with like-minded people, Spady found himself even

more determined to invent "the ideal antidote to NCLB" in the form of an educational

model that would be the "generic prototype" and an "absolute contradiction to school in a

box." Spady started orchestrating the movement towards this vision using the network of

people he was meeting. He soon contacted Barbara McCombs in Denver who had

published material about learner-centered pedagogy. At the time, McCombs also served

as the Division C Vice-President of AERA. With her on board, the network ended up

with seven people. However, McCombs suggested one more participant.

> Then, she persuades me to invite this other fellow, whose name will go
> unmentioned, who she had talked to, and he had gotten into these e-mail
> dialogues. I thought: This is overkill. This is not going to be productive because I
> wanted people who were grounded, sane, collaborative, straight shooters who
> were brilliant and insightful and whatever. (W.G. Spady, interview, June 14,
> 2010)

Spady bristled, but he accepted this man's participation. Everybody met in Denver.

McCombs hosted the first meeting, and "after endless debate for three days" the group

decided to call itself the New Possibilities Network. Spady recalled grabbing the reins:

"As always I undertook the job of: Okay, I'll pull this altogether and try to write the document and disseminate everything we said here and what we agreed." However, Spady was quite upset with the very confrontational and "cantankerous" behavior of the individual that McCombs insisted upon.

The network held a second meeting in August again in Denver. The confrontational "fellow managed to disinvite himself and drop out." Spady welcomed three more people to the second meeting. This new group included a political activist and former teacher, Angela Engel; a state legislator, Evie Hudack, "who was a huge Bill Spady fan"; and Ken Turner, who was the new Deputy State Superintendent in Colorado. The three offered the network what they thought were the "challenges" and the "realities" of creating a countermeasure to NCLB. Spady described the strengthened network as "an elite powerhouse group of people with real track records." Spady said that the second meeting was "particularly productive."

The network met again in November of 2007 in California at the home of the Caines, and they met one more time in the January or February of 2008. Reid Cornwell, who was a colleague of McComb's, joined the network around that time. However, it was getting difficult to communicate with the network. According to Spady:

> The dilemma we faced was we were all scattered, which is just not easy, no matter what. It doesn't matter how many computers you own. Everybody was still busy doing their own thing, to make their own living in their own way. (W.G. Spady, interview, June 14, 2010)

The network suddenly disintegrated in the summer of 2008. Spady described the factors that led to the network's demise. According to Spady, one of the people in the group had

become "increasingly dysfunctional" in his or her life. Spady would not identify this individual's "sex or zip code." He believed that this person's "level of dysfunction was so apparent and so intense that it just threw the dynamic of the entire group for a loop."

Another factor was "that everybody was so busy doing their own thing and still advocating their own thing" when they had agreed that the effort would be a synthesis of all their work, that nobody would be identified as an author. Spady recalled:

> They made me swear: Give up all your work. Give up all your frame works, all your models. I said: Fine, I will. Then, they didn't, all right? And I was the author. I'm busy synthesizing all their stuff which was fine, but then they were still unhappy. They were waiting for me to be the decisive leader that did everything but never put my own point of view in it. (W.G. Spady, interview, June 14, 2010)

Two individuals never adopted the integrated synthesis mode at in their thinking. Their own work and their own models were all that they could key on. Spady recalled the dynamic:

> You would ask a question about A, and they would give you B because B was their thing. That was the answer to every question! The kind of intellectual flexibility that I felt was imperative and the kind of total collaborative synthesis input that I was seeking from this group didn't manifest. (W.G. Spady, interview, June 14, 2010)

The network got really "bogged down" in the midst of creating its website. They bickered about what should be on the site, what shouldn't be on the website, and who should do the labor. They were all to write personal biographies to include on the website but not to mention any of their own work.

According to Spady, they were "setting up these conditions of nobody gets to be the star." However, he believed that this created a "no-win" bind where the network couldn't show anyone outside of itself that they were credible as educators and agents of

change. Spady ended up editing everyone's material so that they looked consistent and

professional rather than "random shit." Spady expressed disappointment in himself and

his own personality:

> If you want to know the true truth about me, it's that I was too tolerant despite everything I'm ranting on to you about of people not doing a good job. I had a soft heart. I knew they can do better. I didn't operationally know how to crack the whip when it was needed because I lived the five 'Cs'. I lived them. I lived collaboration and compassion as intensely as I lived creativity and competence. The dance is not an easy one…The fact is with students I knew how to say: Look, this isn't good enough. This is how to make it better. With colleagues, I didn't know how to give "Fs," okay? I didn't. I would have rather started over completely with different people, an entirely different cast of characters. (W.G. Spady, interview, June 14, 2010)

Although Spady claimed that he lived the five "Cs", the one "C" that Spady left out here

was "conscious." Spady wasn't conscious of the effect he may have possibly had on the

break-up of the Network.

Spady had started several significant initiatives like Network for Outcome-Based

Schools and Division G. In each case, like the New Possibilities Network, the initiatives

were scuttled because of what he called "significant personality dissonance, priority

dissonance, [and] psychological dissonance factors." Spady used the person that

McCombs brought to the initial meeting as an example of the dissonance that can destroy

a group:

> I knew he was nothing but trouble, and, man, he manifested it in the first ten minutes. It's like: We have two and a half more days to go here, and we're just going to put up with these diatribes and these accusations…I had come to the point where I was going to disinvite him if he didn't bow out on his own. And he did. Because it just absolutely was ruining what I thought was going to be an ideal…What I've learned is the woman who recommended him has a need to heal wounded people. That's not what this is about. You can do that in your spare time. You can do that on your job…We are not in the business of healing people's

wounds. We're trying to move something forward with healthy functioning people. (W.G. Spady, interview, June 15, 2010)

Spady said that he didn't know how to do "personality transplants," and he was finding that as he aged he became more sensitive to whether an individual was a team player.

The New Possibilities Network lasted for a year and a half. With no external funding and the personality dissonance, it couldn't continue. However, Spady claimed that he used the work that the network produced in his 2010 book, *Learning Communities 2.0*. Spady summed up the "short life of the New Possibilities Network" as "really discouraging" to him (W.G. Spady, interview, June 14, 2010).

CHAPTER SEVEN

CONCLUSION

Spady On Educational Change

On the afternoon of June 15, 2010, Spady reflected on his 37 years dedicated to

educational change in the U.S., Canada, Australia, and, most especially, South Africa:

I mentioned way back when that Bidwell himself represented to me such a
pinnacle of intellectual incisiveness and depth that he was a role model in an
idealistic sense. He was a role model of: Here is how much deeper you could go.
Here is how much higher you could go. Here is what real scholarship and
intellectual integrity and depth is all about.
      Let's pretend that what I did [was] internalize that ideal about standards of
excellence, about making your work as absolutely good as you knew how to make
it at the time, no shortcuts, no bullshit, no faking it. If it didn't have a rock solid--
we came to call it, by the way, because when you get totally icy ski conditions--
they call it 'bulletproof snow.' [We] were always trying to make our work as
bulletproof as possible because the education world was littered with skeptics who
just wanted everything to stay the same. If they could find any tiny little thing to
criticize, they would. When you're in the educational change business and you
really have a vision to bring to the world, it better be bulletproof, or they're just
going to decimate it if they possibly can…
      My work has always been based on being absolutely solid and yet relating
to common sense, what people would think of as reality. There is a sense of
idealism, an idealistic standard and norm toward which I always worked. There
were times when I was not as diplomatic as I could have been, should have been
about other people's work because I saw them as being entrepreneurial without the
depth and the integrity, and that just sort of violated some moral sense in me.
      Sure, that may be how wheeler dealers operate, but it's not how I operate.
I may have made my life and my career way harder than it needed to be because I
wasn't willing to take the intellectual shortcuts or the moral shortcuts that other
people seem to be very willing to take in order to move things forward. I didn't
steal other people's overheads and put my name on them. The ratio of that
happening to me, doing it with other people's work, is 100% the other way. I was
always working to synthesize ideas [and] integrate: This is a good concept. It only

peripherally relates to one part I am doing, but look at how it will enrich and strengthen that thing. I would be willing to pull it in.

Other people: That doesn't have anything to do with OBE! Well, it has to do with how systems function! My thinking was always systemic…In terms of trying to put things into models and systems and both seeing them simultaneously in terms of the big picture and the little details, that's how it all had to work for me. I needed to know that the details would work in order to have the big concept, and the details had to represent a bigger concept or else they were just details.

I somehow in the way my brain worked and everything else have been both a big picture *and* a detail person, not down to what does the teacher do ten minutes after the class starts, but knowing that the operational components and the elements that formed the systemic picture had integrity, made sense, really worked, really matched the nature of what we were trying to do. I just had to keep learning and learning and learning because the deeper things went the more things I had to take into account if this was going to be bulletproof because I wanted it to be bulletproof. I wanted education to move toward a transformational model, not regress into an even more entrenched narrow industrial age, factory model like it has done…

It's regressing even deeper into the past…For every ten years that my thinking advances, the policy world and the practice world regress another 20 into the past. I'm 80 years ahead of my time! Will we ever recover from this? This is the question for me. If the iceberg [depicts] a bureaucratic age [educational] culture with an industrial age delivery system [that is] driven by an agricultural age calendar with a feudal age agenda, the iceberg is colder and bigger and more frozen today than it was in 1980 when we really in a major way started chipping away at it. It's a bigger, denser, colder, gigantic iceberg now then it was when we started. From that perspective, where have the last 40 years gotten me?

I mean, yeah, I've published all this stuff and maybe that's influenced other people's work but in terms of what's going on out there in the world, they've been busy ignoring me, and the paradox is the people who only understand traditional OBE are saying: Look how you have changed the whole country! They're all doing outcome-based education. The whole country is [doing it] because of you, and it's like: Shit, if that's my legacy, then…I'm out of here. If that's my legacy, if it's just all about having done traditional OBE harder and longer and more of it worse: Well, if that's my legacy, what an embarrassment! What an embarrassment!

[That's] why I quit the Network for Outcome-Based Schools because it was all just totally entrenching deeper and deeper traditional OBE. Couldn't go there, just couldn't go there. It's why I said after the speech of this person who gave the same speech not only two years in a row, they invited him back for a third year, same gestures, same joke: Gee, where I come from a 'fur piece' is a way down the road--three years in a row! It's why I said: I'm out of here! If this is

about making up your test on Thursday night so you can give them a Friday grade, I'm gone. Okay? I'm gone.

It's how I've been with all this stuff my whole career. Just look at it outside of these educentric boxes. Look at human beings. Don't look at curriculum categories, and see what you see. Look at life. Good old Lee Iacocca was a general session speaker at the ASCD (Association for Supervision and Curriculum Development) National Conference in what I believe was the spring of '94 in Chicago. I didn't see the speech but heard the tape, and so I'm going to misrepresent this slightly. He basically said, using the old Walter Winchell line: When Mr. and Mrs. America get up in the morning to put on their clothes and get out the door they don't go out and do English. They don't go out and do Social Studies. They do some other kind of construct which I had already labeled spheres of living or domains of living. They do these functional kinds of actions and activities that make their life work. They don't do school subjects. A prize winning comment.

That's where I always was. Look at what's going on out here. That really triggered [me] to go back and re-enforce something after I read that valedictorian article, that research study that had been done and the massive unemployment of these brilliant valedictorians from major universities. It's like, man, education sure is missing the boat. They may be brilliant at something, but it ain't life, or it ain't functioning in a changing world that they're brilliant at…

I had to step totally beyond the paradigm, create a new one in effect, a new frame of reference, then design down. If you really want people to function in these domains and if these are the conditions and challenges and things that are happening out in the world for people in those domains, what do we need to prepare them to do? It seemed like common sense. But the gap between what it was, however common sense it was, and what schools were entrenched doing was so huge that very few people were willing to go there, and those who were got just as crucified by the Far Right as we did for ever advocating anything so heretical. That's kind of how it worked.

It was just my mind could see these possibilities and these constructs and these framework-y things that other people couldn't see…It's, like, look at this. This just opens up a whole avenue for us; let's march down this road. Oh, we've never been down that road. Oh, my God, there could be boogey men down there. I remember this one guy-- I don't know where this school district was, but I think it was in New York somewhere--and I'm laying out all this stuff and he raises his hand, an older fellow: Does this mean we have to do more work? Right in the middle of this whole thing! Does this mean we have to do more work? And, I said: I think! He said: Well, I'm not interested. I'm not going to do it. I don't want to do more work.

It was Doug Mitchell who basically offered the insight: This outcome stuff you're talking about is just like merit badges in the Scouts. It's like: God, you're right!...After we had been writing this stuff and doing this stuff for quite some

time, Mitchell had another insight, and this is when I was out visiting him and working with him out in [University of California] Riverside. He said: You know, I've been thinking about this. I think that if I were really an outcome-based professor this is what I would do. He said: I think what I would have to do if I was really going to do this is go into class on the first day and give them the final exam, and basically say: Here is the final exam. When you know and can do all the things that are asked in this exam, come see me, show me that, and you're done. In the meantime, we'll have classes, okay? I will be explaining things that will be contributing directly to this, but whenever you think you're ready come see me, and we'll check it out. You might not have to come back to class anymore.

I said: God, Mitchell, you've got it! This gave me this idea. I would do this shtick about: How many of you out there want to be an outcome- based teacher? Oh, yeah! Oh, yeah! Well, here is what you do. Give all the kids the final exam on the first day. Just to throw their whole paradigm sideways, just absolutely. I am doing this thing in this gigantic audience of people on the famous first day of school. I called it the opening day orgy where the district -- oh, you've got to be our speaker for the opening day of school! I don't know where this was anymore. It may have been in Ohio somewhere. I was up on a stage and there was this mass of people out there, and I couldn't see anybody because it was all these floodlights and everything. And, I need feedback. I need to see people. That's energizing. I feed off of audience reaction. It was just like talking into the ultimate black hole because there was just nothing out there but blackness.

I got to my shtick: Well, if you really want to be an outcome-based teacher, you give the kids the final exam on the first day. This voice from way back in the back of this gigantic auditorium yells out: I can't do that! And I said: Why not?! And the voice said: It wouldn't be fair. And I said: Why not, again? And the voice says: Because if I gave them the final exam on the first day, they'd learn it. I had to do everything I could from just completely going to pieces. I said: I know! Honest to God, this is exactly what happened: If I gave them the final exam they would learn it, and that wouldn't be fair...

The Walsch thing really called to me because…I could take everything that I knew I was inherently working toward which was learner empowerment and connect it to his concept of human capacity and empowerment. It was like: Oh, my God, the synthesis of these two things is absolutely unbelievable, and that's actually what I've been working toward my whole life. I just didn't know it, didn't have the words for it, didn't have the concepts. It's like: Yeah, that's what I'm all about. I jumped into that endeavor with probably a deeper and clearer sense of commitment than anything, than maybe even the OBE stuff because I simply saw the OBE stuff was a vehicle that brought me to that place. I simply had had an incomplete picture of it…

One perspective that one could have on how the world functions including education is that we, as a civilization, have been profoundly wounding each other ever since mankind crawled out of the cave. We keep wounding each other all in

the need of status needs and whatever other things we conjure up. It's a massive wounding operation, and some of the wounds are more sophisticated and subtle and gentle than others. Others are totally brutal and awful, and we just keep wounding and wounding and wounding and wounding because we're just on a hamster treadmill. We just keep doing it…

That fifth book of Neale's…*Communion with God*, about the ten illusions, the ten illusions are the fuel that feeds the treadmill that just keeps us doing the same thing to each other century after century after century in an ever more slightly sophisticated sort of way. Now, what's spiritual growth? It's about getting that and stopping that in your own life. It's getting off the treadmill and becoming an observer of all this crap that's going on, not a player. It's what God calls in Neale's books being *in* but not *within* the illusion. This is our three dimensional world. This is how everybody is. We get to choose how we want to be. We get to choose how we would like to influence that world, but we do not have to emotionally and psychologically buy into its agenda as a way of defining ourselves.

The world functions as this gigantic wounding and damaging machine. What we've been experiencing on the planet, thankfully, over this last century has been a gradual but ever accelerating curve of more and more people being aware that you really don't need to do life that way, that there really is an alternative. To put it in over-exaggerated terms: It is the difference between fear-based living--everybody is protecting something and doing all this shit--and love-based living, and it's tough. It is tough because everything in our world is promoting fear, and the basic fear is…your life just can't possibly be okay as it is because you need our product. It will save you ten dollars. Oh, my God, ten dollars, I better sign up. Everything is about: You are not okay as you are! You've got to buy our stuff to be okay…

When we had the big debate with Neale, and Neale yells out: We are God! And I say: Well, try to sell that! It's like how do you sell--yes, that is absolutely true, we are—[but] how do you sell that to people who rabidly believe something else? And not get yourself crucified all over again which is what that whole Christian Right thing is about and what the Grayslake thing in its highest form, its highest perfect form, except there wasn't a cross outside and a bonfire. It was just one step short of that…

So when your daughter tells you and writes: I love you, Daddy, hoard that. Hoard that because in a few years her peer group is going to say: Oh, that's silly…See, the culture makes authentic compassion weak. It defines it as weak. We have to be number one. If we don't win – okay, here is Spady's shtick: It's basketball season in America. Every team but one loses their last game…No matter how good you are, no matter how well you play the game, every team but one loses their last game. Their season ends on a downer, and we use it to justify the champion. That's what the vertical dimension is about. It's about individual achievement…In traditional societies…you are nothing more than what the

community is. In Western civilization, this is totally lost. Everything is about what the individual does assumedly on their own terms. If you ain't got the balance, if you can't achieve the balance, create the balance in your own life in an institution in a school in a family. If you can't create a healthy constructive balance of those two dimensions, you're in deep trouble. You are genuinely out of balance…

I'm in a very big state of transition right now and some of it may--or what's sort of motivating me now or whatever--may seem like a pretty profound discontinuity from all the stuff that's here. That is, the future doesn't look like the past. It's not an extension of the past. It's a departure which is what the word 'transformation' just might mean. There's that critical thing…

It has to do with this concept that I mentioned about detachment, that is, detaching emotionally from the agenda. Almost all the things we've been talking about have come out of a sense of mission I've had about really making a big difference in the world via education. It's both [about] making a real difference in the world of education and making a difference in the world through education, and all the things you've shown me here and the things that you've brought up that I've been unaware of have been very validating and very confirming and it's like: Oh, my God, I guess I made some difference! But, when I put that in the context of today, against the juggernaut of the reform movement, it is as if everything I did made no difference at all because of the extent to which I was trying to move education and educational thinking along that teeter totter continuum. If that were a teeter totter, we would have a 900-pound gorilla sitting at one end and a flea sitting at the other.

You look at a lifetime of work against the evolution of politically-driven change, and you say, just like I did in South Africa: I'm done beating my head against the wall. I've given it my best effort, and…I have surrendered to the reality that the political juggernaut is way bigger than I am. It's way bigger than the New Possibilities Network was…All kinds of good people are trying to offer a counter-voice that is being just absolutely plowed over and plowed under by your *close personal friend*, Arne Duncan, and, of course, the entire politico-economico-corporatistico juggernaut behind him.

So, you say: Well, what good has all this done? Do I want to continue to invest whatever -- however many more years are in my life to what looks like trying to push a gigantic elephant up a mountain side?...The answer is: No, I want to do other things in my life that are more fulfilling, more purposeful, more enjoyable rather than continuing in what the South Africans were calling 'the Struggle' because out in the desert in the autumn of 2007, I had a huge experience and gave up. This was big stuff: gave up sacrifice, struggle, and suffering as having anything to do with my true inner essence. The attachment was cut…

It's over. I am done struggling. I am done sacrificing. That whole syndrome of: Oh, my God, the world will fall apart unless I am out there. It's like, nope, they're going to do all the crazy things that they do…One year ago today I

was having no fun at all writing and editing and struggling through these two books, but it was like: This is it. I am not writing anymore about education. I have other things to bring to the world that are bigger…Let's just say that there just may not be any more to add to the story about education in the future unless the universe provides a million or two dollars to establish a HeartLight-type school that's really grounded around the best of what all these amazing colleagues have to offer plus the inner work I've done.

Unless that kind of thing happens, my work is about helping civilization evolve and heal, and maybe that's what this has all been about anyway. If you want to do a really retrospective deeper big picture spin on it, maybe that is what it's all really been about. It's been about empowering people to be way more than the conventional institutions. It may be that this is all been about empowering people to see more and be more than our conventional institutions have ever allowed them to be. That might put this whole thing in a nutshell. That may be what it's all been about, and what I've had to do. It has been a continuous lifetime of learning about: 'Oh, empowerment is bigger than you thought.' (W.G. Spady, interview, June 15, 2010)

Conclusion

Denzin's approach to interpretive biography depended on the use and collection of qualitative data such as my series of interviews with Spady that described turning-points in a subject's life. Denzin called these turning points or significant events in one's life "epiphanies" (p. 22). Epiphanies were defining moments that left marks, moments that changed "the fundamental meaning structures in a person's life" (p. 71). Denzin claimed that these moments could be re-experienced through intensive interviewing, structured through narratives, and through analysis and interpretation provide shareable understandings of an individual's life, in this case, a life built around a passion for effecting educational change.

I used the most significant events in Spady's life as a way to frame the narrative. The titles and sub-titles of most of the chapters identify these epiphanic events: Spady's youth in Oregon, his experiences at the University of Chicago, his time at Harvard, his

work with mastery learning, his development of OBE, his struggles in Pennsylvania, his influence in South Africa, his travels in Australia, his creation of HeartLight International, and then his reflection on the project of educational change itself.

I had three questions to answer in this dissertation: What series of circumstances, events, and individuals have shaped and changed Spady's life and career trajectory? What factors affected Spady's thoughts, values, and beliefs about education? How do his thoughts, ideas, and values correlate with the events in his life in education? Like the significant events, I also identified and treated the "circumstances," " individuals," "factors," "thoughts," " ideas," and "values" that either "shaped and changed" Spady's life or "affected" Spady's "beliefs about education" or correlated "with the events in his life in education" as epiphanies in Denzin's sense, as turning points in Spady's life and career.

The fact that Spady was raised in a *Wolgadeutsche* household was probably the first circumstance that had a profound influence on Spady, especially regarding his embrace of *schaffen* or "hard, productive work" in German. Spady's father was particularly enterprising and industrious, building the largest hog farm in Oregon. From his father's example, Spady learned early in his life the importance of hard work. In fact, Spady claimed that he trained for Harvard by shoveling manure on his father's farm.

Spady's interest in *schaffen* was evident in his career at the University of Chicago where he worked in the Admissions Office while attending school full-time and writing a thesis and a dissertation. Productive work drove Spady at Harvard and OISE. Spady worked very hard, harder than most, throughout his life and career, taking the reins of any

group he joined, whether it was Division G, the Network for Outcome-Based Schools, HeartLight International or the New Possibilities Network. Spady produced the frameworks. He wrote the newsletters. He marketed the approaches.

Spady's mother was very demanding and difficult. She made sure that Spady diligently practiced his piano and his trumpet. Spady's mother expected the best from her son in music, sports, education, and anything else that Spady was involved in. Spady delivered in all three pursuits. He played in the Oregon All-State Orchestra and on the stage of Carnegie Hall. He seriously considered the trumpet and music as a career until his conversation with Rapier steered him to education. Spady was a star athlete who played in a state title game and who was recruited to play with the best athletes. Spady taught at Harvard, and the curriculum he popularized was adopted as the national curriculum of South Africa.

Like his mother, Spady was demanding of others throughout his career, and he could be difficult. He expected more than flubbed grounders from his teammates. He expected more from Glazer than reading the newspaper to his Harvard classroom. He expected more from Block than petulant behavior. He had high expectations for Walsch and Asmal that went unfulfilled. Walsch went out for Chinese food during a curriculum development session, and Asmal held his head in feeble dismay after the debriefing of the OBE session for the one hundred most influential educators in South Africa. Spady emulated Bidwell who he saw as a bullet-proof paragon of the University of Chicago mind-set. Spady was bitterly disappointed that the rest of the world, like South Africa, was not bullet-proof.

In line with the ethos of *schaffen*, Spady valued persistence although his persistence at times became a kind of single-mindedness where he alone charted his own course, sometimes for the good and sometimes for the not-so-good. For the good, his persistent single-mindedness kept Spady pounding at the doors of the statehouses in Utah, Arizona, Minnesota, and Pennsylvania to change schools for the better. It kept him on the road 220 days a year proselytizing OBE. It made him return to Australia and South Africa again and again in hopes of transforming educational systems that were time-bound and rigid. It kept him slugging away at the educational inertia in the U.S., at educentrism, and at the unyielding juggernaut that the Department of Education seemed for him.

To his credit, this was all in the service of young people. Spady had been profoundly influenced by the Coleman Report, seeing it as the first document that championed educational access for all, regardless of gender or ethnicity or anything else that formerly held individuals back. In the wake of the Report, Spady traded the quantitative research he excelled in at the University of Chicago for curriculum innovation that he believed would guarantee learning for every student.

However, his single-mindedness at times worked to the detriment of the organizations Spady helped to create to produce educational change. His challenge to the mastery learning assembly split the group in two during its rapid emergence in the 1970s. His difficulties with Block and others spelled the end of the Network of Outcome-Based Schools during the rise of OBE in the U.S. He was unable to negotiate a change to the direction of Curriculum 2005 in South Africa because of his single-minded demand for his ideas of excellence. The New Possibilities Network failed because of personality

conflicts between Spady and others when self-effacement was to be the guiding ethos of the Network. Spady always wanted to start over with a different group when maybe some of the difficulties could have been self-generated.

Spady's father sent Spady to the University of Chicago to make something of himself. Spady succeeded. Spady truly made something of himself. In 1967, Spady used Durkheim's theory of suicides to explain first year attrition. That became the basis of social integration theory in retention studies. Spady predated Bourdieu's theory of cultural capital with his mining of the data set that showed the paradoxical rise in educational attainment and aspirations in the lowest of the low socio-economic sector. Spady's work became a staple in the sociology of sports. Spady was at the table with Bloom and Block over mastery learning in the beginning of the movement. Spady changed the process of re-affirmation of schools at NCATE. Spady popularized Outcome-Based Education in the U.S. Twenty-six states adopted his curriculum. Spady's transformational version of OBE became the national curriculum of South Africa. Spady's work still affects the Catholic schools in Queensland. Spady teamed with Walsch, the best-selling author of millions of books world-wide, to create learning communities around their tenets.

However, with the high-profile successes came some failures. Spady believed that Pennsylvania embodied the worst for him because he was so close to changing things at the state level. Then, the rug was pulled out by traditionalist forces that saw OBE as social engineering and mind control. Spady called what happened to him in Pennsylvania a crucifixion. He admitted that he was idealistic and possibly unrealistic, but his passion

for education was such that he was willing time after time to put his neck out. In his mind, he was trying to do great good for people through transformational OBE, and he was bitterly wounded by the response from its detractors. In Pennsylvania, Spady realized that educational change was extremely difficult, maybe nearly impossible, and there were few benefits reaped for the agent of change.

Spady provided the lessons to be learned here in his own words on educational change. In order for change to occur, the former educational paradigm must be scrapped. There must be radical, systemic change. Seat minutes needed to go. Carnegie units needed to go. Grading in ink needed to go. Time must be one variable, and learning must be the only constant. If my six year old can't learn to ride a bike in six weeks, do I grade her unfavorably in ink and walk away? That would be really bad parenting.

However, Spady understood that the educational system consisted of people who excelled in school. These people believed that if school based on a Fordist paradigm was good for them, then it was good for everyone else. Spady called it educentrism, that the language and methods of the problematic system were used to re-form the system. Thus, we have a standards movement with an abiding interest in re-forming something that for Spady was beyond re-formulation and repair, and the system will remain broken until learning drives education not certification.

According to Spady's reflection, educational change in the U.S. and globally was extremely difficult and ultimately unrewarding, so Spady gave up. He called it "detachment." He said that he was through struggling, that learner empowerment was bigger than he thought. I don't believe any of that. I still receive e-mails about education

weekly from Spady that are fervently passed among many of the names mentioned in this oral history: McCombs, Bernstein, Brandt, Brady, the Caines, and many others. All of these e-mails still speak to Spady's passion for educational change. He hasn't quit. He's still at work.

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