Marcus Shelby Jazz Orchestra: *The Legacy of Duke Ellington: 50 Years of Swing!*

Tuesday, May 6, 2014
Zellerbach Hall, University of California Berkeley

*Sponsored by Maris & Ivan Meyerson*
On Tuesday, May 6, at 11am, your class will attend the Marcus Shelby Jazz Orchestra’s performance of The Legacy of Duke Ellington: 50 Years of Swing! at Cal Performances’ Zellerbach Hall.

Bassist and bandleader Marcus Shelby, his jazz orchestra, and special guests headline this concert celebrating the legacy of America’s jazz master Duke Ellington with music that spans 50 years of his career. From 1924 until his passing in 1974, Ellington was one of the world’s most prolific, inventive composers. Early in his career he composed for the Cotton Club, Broadway theater productions, and dances at the Savoy Ballroom, and later he wrote tone poems, suites, film scores, ballets, sacred music, and much more.

Using This Study Guide
You can use these materials to engage your students and enrich their Cal Performances field trip. Before attending the performance, we encourage you to:
- Copy the student Resource Sheet on pages 3 & 4 and give it to your students several days before the show.
- Discuss the information About the Performance & Artists on pages 5 & 6 with your students.
- Read to your students from A Brief History of Jazz on page 7-9, Jazz Timeline on page 10 & 11, Fundamentals of Jazz and Jazz FAQs on pages 12-15 and Traditional Jazz Instruments on page 16.
- Engage your students in two or more activities on pages 17-19.
- Reflect with your students by asking them guiding questions, found on pages 3, 5, & 7.
- Immerse students further into the subject matter and art form by using the Resource section on page 21.

At the performance:
Your class can actively participate during the performance by:
- LISTENING CAREFULLY to the melodies, harmonies and rhythms of the music
- OBSERVING how the musicians work together, sometimes playing in solos, duets, trios and as an ensemble
- THINKING ABOUT the culture, history, ideas, and emotions expressed through the music
- MARVELING at the skill of the musicians
- REFLECTING on the sounds and sights experienced at the theater.

We look forward to seeing you at SchoolTime!

Laura Abrams  
Director, Education & Community Programs  
Cal Performances

Rica Anderson  
Education Programs Administrator  
Cal Performances
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Be prepared and arrive early.
Ideally you should arrive at the theater 30 to 45 minutes before the show. Allow for travel time and parking, and plan to be in your seats at least 15 minutes before the performance begins.

Be aware and remain quiet.
The theater is a “live” space—you can hear the performers easily, but they can also hear you, and you can hear other audience members, too! Even the smallest sounds, like rustling papers and whispering, can be heard throughout the theater, so it’s best to stay quiet so that everyone can enjoy the performance without distractions. The international sign for “Quiet Please” is to silently raise your index finger to your lips.

Show appreciation by applauding.
Applause is the best way to show your enthusiasm and appreciation. Performers return their appreciation for your attention by bowing to the audience at the end of the show. It is always appropriate to applaud at the end of a performance, and it is customary to continue clapping until the curtain comes down or the house lights come up.

Participate by responding to the action onstage.
Sometimes during a performance, you may respond by laughing, crying or sighing. By all means, feel free to do so! Appreciation can be shown in many different ways, depending upon the art form. For instance, an audience attending a string quartet performance will sit very quietly, while the audience at a gospel concert may be inspired to participate by clapping and shouting.

Concentrate to help the performers.
These artists use concentration to focus their energy while on stage. If the audience is focused while watching the performance, they feel supported and are able to do their best work. They can feel that you are with them!

Please note:
Backpacks and lunches are not permitted in the theater. Bags are provided for lobby storage in the event that you bring these with you. There is absolutely no food or drink permitted in the seating areas. Recording devices of any kind, including cameras, cannot be used during performances. Please remember to turn off your cell phone before the performance begins.
What You’ll See
On Tuesday, May 6, your class will experience the Marcus Shelby Jazz Orchestra performing, “The Legacy of Duke Ellington: 50 Years of Swing!” The concert will trace this jazz master’s wide range of compositions over the course of his musical career as a composer and bandleader.

About Marcus Shelby & The Marcus Shelby Jazz Orchestra
A talented musician, composer and arranger, Marcus Shelby formed the Marcus Shelby Jazz Orchestra in 1999. Some of the San Francisco Bay Area’s most respected performers including singers Faye Carol and Kenny Washington, and well-known musicians such as Howard Wiley (tenor/soprano), Rob Barics (tenor/clarinet), Gabe Eaton (alto saxophone), Mike Olmos (trumpet), Adam Shulman (piano), and Joel Behrman (trombone) make up this acclaimed ensemble.

In the last 10 years, the orchestra has performed and recorded many of Shelby’s original compositions and award-winning works, as well as music by great composers like Duke Ellington and Billy Strayhorn.

The Marcus Shelby Jazz Orchestra currently performs at Bay Area clubs, universities, high schools, elementary schools, churches, festivals, and concert venues.

About Duke Ellington
Duke Ellington was born Edward Kennedy Ellington in Washington, D.C. and had a rich career as a composer, bandleader, and recording artist that lasted more than fifty years. Early in his life a classmate who admired him called him “Duke” and because of his elegant manner and stylish clothes the royal nickname stuck.

Ellington started taking piano lessons at the age of seven. In high school, his music teacher gave him lessons in harmony and pianist and band leader Oliver “Doc” Perry taught him to read and write music, develop a professional style, and improve his technique.

In 1923, Ellington moved to New York and formed his own band, the Washingtonians. His compositions brought together different styles of American music, including ragtime and blues and were direct and expressive in a unique way. In 1927, Ellington accepted an engagement at Harlem’s hottest jazz spot, the Cotton Club, where he wrote some of his most well-known pieces. He later formed the Duke Ellington Orchestra. By 1930, it had grown to include 12 musicians and received national recognition through recordings, radio broadcasts, and film appearances.

Ellington wrote music for all kinds of settings: the ballroom, the nightclub, the theater, the concert
hall and the church. Beginning in 1943, Carnegie Hall began hosting a series of concerts with the Duke Ellington Orchestra featuring his extended compositions which were sometimes 45 minutes long - much longer than his earlier music.

Ellington received many awards throughout his lifetime including thirteen Grammy Awards and the Presidential Medal of Freedom. “My men and my race are the inspiration of my work,” Ellington said. “I try to catch the character and mood and feeling of my people”.

**What is Jazz?**

Jazz is a kind of music that came out of several African American musical traditions, particularly the blues and ragtime.

**The Blues**

The blues grew out of African American spirituals and work songs after the Civil War. Like spirituals, the blues began as vocal music that used African musical styles, such as call and response. As the music became more popular, musicians began playing blues songs on instruments. To have “the blues” meant to feel depressed or sad, and blues songs usually focused on personal struggles like being heartbroken, poor, or treated unfairly.

**Ragtime**

Ragtime was the earliest form of jazz. A type of music that used syncopation (placing an accent on a normally weak beat) and improvisation, ragtime was performed at entertainment venues and social events. While piano ragtime is more well-known, ragtime was also played on banjos, fiddles, harmonicas, drums, trumpets, and whatever other instruments were available.

**Jazz Through the Years**

Throughout the 20th century, various types of jazz became popular. Swing dominated the 1930s and 1940s. A style of dance music played by big and small bands, swing features a strong rhythm section with a medium to fast tempo.

Bebop, a jazz style of the 1940s, focused on long melodic lines and expressive harmonic patterns that often end on an accented upbeat. In cool jazz, musicians of the late 1940s and early 1950s tried to shift around the basic elements of jazz. They composed smoother, softer melodies and more subtle rhythms and used new combinations of musical instruments.

By the 1960s and 1970s, many different kinds of jazz were evolving. For example, progressive jazz took bebop and cool jazz techniques to a new level, and funky jazz updated blues and gospel oriented music with a shot of funk’s strong, rhythmic groove. Abstract jazz allowed musicians to be more explorative and improvisational, and jazz rock mixed elements of rock and jazz, often using electronic instruments.

In the 1980s, the softer-sounding mainstream jazz fusion became popular, and in the 90s jazz artists borrowed from rap, hip-hop and even metal rock.

Today, interest is still growing in jazz, with the help of key jazz ambassadors like the Marcus Shelby Jazz Orchestra.

**The Building Blocks of Music**

The three most important elements in music are:

- Melody
- Harmony
- Rhythm

When you listen carefully to music, you can hear the tune or melody; the notes that provide counterpoint to the tune, called harmony, and you can feel the beat of the music, also known as rhythm.

Musical styles are defined by how these three important elements are used. These elements also provide a framework for musicians to know the ways they can create and play music together.

**How do you hear these three important “building blocks” in a jazz performance?**

When a jazz ensemble performs, the rhythm is usually played by the drums. A string bass or bass guitar helps the drummer “keep time,” and also plays the low notes that sound good with the melody and harmony.

The piano and the guitar play the harmony or chord progressions. These are other notes that sound good with the melody. When these “harmony” notes are played together they are called chords, when they are played separately they are called arpeggios, or broken chords. The piano and the guitar are sometimes used to play the rhythm when there is no bass or drums.

The melody may be played by any instrument. It may also be sung. In large groups, the melody is frequently played by instruments like the trumpet, trombone, saxophone, clarinet, flute or violin.
About the Performance & Artists

Guiding Questions:
• What might you expect to hear at the Marcus Shelby Jazz Orchestra performance?
• What are some of Marcus Shelby’s accomplishments?
• Describe the ways Duke Ellington has influenced jazz music.

The SchoolTime Performance
Bay Area bassist and bandleader Marcus Shelby and his all-star local jazz orchestra takes the audience on a swinging journey through the glorious 50-year career of Duke Ellington. The orchestra will perform many of the Duke’s treasured masterpieces - from his Cotton Club days in the 1920s to his evocative suites and sacred music of the 1960s and 1970s.

About Marcus Shelby
“Marcus Shelby illuminates history through jazz.” - SF Gate

Marcus Anthony Shelby is an accomplished composer, arranger, bassist and teaching artist. Formerly bandleader of Columbia Records and GRP Impulse! Recording Artists Black/Note, he is the Artistic Director and leader of The Marcus Shelby Orchestra, The Marcus Shelby Hot 7, and The Marcus Shelby Trio.

As the 1991 winner of the Charles Mingus Scholarship, Shelby’s studies include work under the tutelage of composer James Newton and legendary bassist Charlie Haden. He was awarded a fellowship from Chicago’s Black Metropolis Research Consortium for his commissioned composition, “Soul of the Movement,” and was a Fellow in the Resident Dialogues Program of the Committee for Black Performing Arts at Stanford University for his commissioned work, “Harriet Tubman.”

Shelby has arranged for and conducted the Count Basie Orchestra featuring Ledisi; performed and recorded with Tom Waits; and received the City Flight Magazine 2005 award as one of the “Top Ten Most Influential African Americans in the Bay Area.”

Currently Shelby is an artist in residence with the Yerba Buena Gardens Festival and is working with playwright and actress Anna Deveare Smith on her new work.

Shelby is very active in music education. He teaches at Rooftop Alternative School in San Francisco, The Community Music Center and the Stanford Jazz Workshop, and Cal Performances in the Classroom. Shelby has also led many of the San Francisco Jazz Festival Family Matinee Concerts. In March 2013, San Francisco Mayor Ed Lee appointed Shelby to the San Francisco Arts Commission.
About the Marcus Shelby Jazz Orchestra
In 1999, Marcus Shelby’s interest in composing for big band orchestra and his work in collaboration with Intersection for the Arts, a Bay Area multidisciplinary arts organization, led him to form the Marcus Shelby Orchestra. Some of the San Francisco Bay Area’s most respected musicians including vocalists Faye Carol and Kenny Washington, and well-known instrumentalists, such as Howard Wiley (tenor/soprano), Rob Barics (tenor/clarinet), Gabe Eaton (alto), Mike Olmos (trumpet), Adam Shulman (piano), and Joel Behrman (trombone), comprise this popular orchestra.

In the last 10 years, the orchestra has performed and recorded an extensive series of Shelby’s original compositions, suites and award-winning commissioned works, as well as a broad survey of arrangements that Shelby has orchestrated from the great composers Duke Ellington and Billy Strayhorn.

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About the Art Form

A Brief History of Jazz
Jazz emerged in the late 1800s in the cosmopolitan port city of New Orleans. A former colony of both France and Spain, the coastal city was home to an astounding variety of cultures and people who found common ground in music. The city swelled with opera, marching bands, ragtime piano, Latin dances, symphony orchestras, string ensembles, barbershop quartets, society dance music, sacred hymns, not-so-sacred blues, and the last vestiges of African song and dance kept alive in Congo Square. Elements of all of these styles, with particular emphasis on ragtime, the blues, and the church, converged in a new music called jazz.

“Father” of Jazz
Though the precise birth of jazz is still shrouded in mystery, musicians, patrons, and scholars affirm the impact of cornetist Charles Buddy Bolden. Though his mythic sound was never recorded, the rhythmic lilt that propelled his band (which peaked around 1905) was appropriated by dozens of New Orleans musicians who heard him “rag” every kind of popular song, filling them with the sound of the blues and the church.

Bolden’s playing inspired New Orleans musicians, who playfully embellished familiar melodies and developed distinctive phrasing and timbres. Among these pioneers were pianist Jelly Roll Morton and cornetist King Oliver, who led their peers in a new exploration of improvisation. They expanded what were once brief moments of embellishment into longer improvisatory statements and found ways to incorporate the freedom of self-expression into their written arrangements. Generally performed by small ensembles of cornet, clarinet, trombone, tuba (or bass), guitar (or banjo) and drums, early New Orleans jazz highlighted collective improvisation—that is, by two or more members of the band.

Early Jazz
Trumpeter and vocalist Louis Armstrong was born on August 4, 1901 in the turbulent New Orleans neighborhood known as “The Battlefield.” He grew up in the brass tradition of Bolden and Oliver. When he arrived in New York in 1924, he was already emerging as a new jazz legend. Though his predecessors had tested the waters of improvisation, it was Armstrong who brought the long, improvised solo to prominence. Like a great storyteller, Louis would string together a series of related phrases, forming a single, coherent statement with a beginning, middle, and ending. He illuminated the details with his distinctive timbre, scat singing, and relaxed style.

Guiding Questions:
- How did jazz evolve?
- Why did many African Americans migrate to the North in the early 1900s?
- Describe the music of the Swing Era.
- Name some musicians who had an impact on jazz's development and describe their influence.

Jazz Legends #1, Anthony C. Fletcher (From left to right: Art Blakey, Charles Mingus, Billie Holiday, Louis Armstrong, Duke Ellington & John Coltrane)
swinging phrasing that has informed nearly every American musician since.

Of course, Armstrong was hardly a singular force in bringing jazz out of the Crescent City, as New Orleans was known. “Storyville,” the city’s red light district, was forced to close during World War I, leaving many musicians in search of work. The nation’s economy was changing from rural to industrial, and jazz musicians, like many African Americans, joined the Great Migration to urban areas of the North in search of work and solace from the prevailing racism of the South. They brought the music to cities like Chicago and New York, where jazz adopted a sophisticated veneer, blending an urban sensibility with its Southern roots.

The Swing Era
During the 1920s, musicians left the small New Orleans ensemble format to join popular ballroom dance bands. These new big bands, as exemplified by the Fletcher Henderson, Duke Ellington, and Don Redman Orchestras, were generally comprised of four brass, three reeds, and a rhythm section. This instrumentation offered enough tonal variety for complex orchestrations while still leaving room for improvisation. By the start of the Swing Era around 1935, most ensembles had evolved into true big bands consisting of three to four trumpets, three trombones, four to five reeds, and a rhythm section (piano, bass, drums, and guitar).

Despite the Depression’s downward economy, or perhaps because of it, the infectious bounce of swing quickly became the pulse of young America. Clarinetist and bandleader Benny Goodman helped propel the swing sound, sharing with radio listeners the exuberant feeling of jazz. Perhaps more importantly, Goodman used his success to challenge the segregation then common in jazz ensembles. He hired the African American pianist Teddy Wilson, and later vibraphonist Lionel Hampton, in a pioneering step towards the integration of jazz on screen, in the recording studio, and on the bandstand. Goodman brought jazz to the cutting edge of civil rights and made a strong case for a fully integrated America.

Swing eventually became the signature music of wartime America. The near-unquenchable marketplace for swing encouraged an extraordinary volume and variety. Duke Ellington, Count Basie, Tommy Dorsey, Jimmie Lunceford, Fletcher Henderson, Artie Shaw, Benny Carter, Glenn Miller, Claude Thornhill, Benny Goodman, and others led bands that managed to combine commercial success and artistic integrity. Together with guitarist Charlie Christian, trumpeter Roy Eldridge, vocalists Billie Holiday, pianist Teddy Wilson, and tenor saxophonists Coleman Hawkins and Lester Young, they created a rhythmic vernacular that continues to impact the music. The heartbeat that propelled the big bands and small ensembles of the Swing Era had a simultaneously relaxed and fervent rhythmic lilt, an endless push and pull that still lies at the heart of jazz.

The Bebop Revolution
By the mid-1940s, a handful of artists longed for an outlet for more extended improvisation and dynamic group interplay. The result was bebop, a revolutionary small group art form pioneered by alto saxophonist Charlie Parker and trumpeter Dizzy Gillespie that set new standards for jazz musicianship. Musicians both shrank from and reveled in the music’s intense rhythmic energy, dissonant harmonies, and serpentine melodies. Though bebop never attained the popularity of swing era jazz, the music’s rebellious spirit and unbridled virtuosity lured its own audience and cemented the idea of jazz as fine art. It is considered by many to be the turning point in jazz history, irrevocably influencing nearly every style to follow.

The Birth of the Cool
Bebop provoked a contentiousness never before seen in jazz and drew a line between the hip and the has-been. As a result, jazz entered the 1950s and 1960s as a plurality of styles. The line between hot and cool was drawn in 1949 when Miles Davis and composer Gil Evans released The Birth of the Cool, a series of lushly orchestrated arrangements. The recording, with its tonal variety and spare, thoughtful phrasing, offered relief from the fever pitch of bebop and spawned a movement known alternately as cool or West Coast jazz. While the music retained the harmonic language and technical virtuosity of bebop, cool’s soft timbres, understated style, and greater compositional element marked a return to the relaxed rhythmic language of the Basie band and the lyrical phrasing of Lester Young. Over time, cool evolved into an umbrella term, encompassing the varied (and often harmonically experimental) music of Lennie Tristano, Lee
Konitz, George Russell, Dave Brubeck and others.

It didn’t take long for the hot to respond, however, this time with a firmly blues-based genre called hard bop. For some, bebop’s insistence on virtuosity and harmonic complexity had created a spiritual void; missing were the swing and soulfulness that defined jazz. Hard bop pioneers Miles Davis, trumpeter Clifford Brown, pianist Horace Silver, saxophonist Hank Mobley, and drummers Art Blakey and Max Roach attempted to reconnect audiences to the blues and the church. They infused bebop with insistent grooves, tuneful melodies, and heavy, aggressive tonalities that brought jazz back to the juke joint. The deep, earthy sound of the tenor saxophone (as exemplified by Sonny Rollins) found a new resonance and the trumpet/tenor pairing soon became the quintessential sound of modern jazz.

Despite hard bop’s strong following, jazz’s strong exploratory impulse was unrelenting. Never complacent, Miles Davis once again led the way in search of greater freedom of self-expression. He found this freedom in modal jazz, an approach to composition and improvisation based on scales rather than the long sequence of chords that characterized most jazz. Though modal jazz had been explored earlier by pianist George Russell, it gained new prominence in the hands of Davis and his collaborator, pianist Bill Evans. Their experiments were fully realized in the landmark 1959 recording Kind of Blue. The album’s spare blues-based moods inspired countless musicians (including Davis’s sideman saxophonist John Coltrane) to explore the creative possibilities of this scalar method.

**Beyond Bop**

The experimental impulse of jazz was not defined by bebop alone. In 1939, a young Dizzy Gillespie befriended band mate Mario Bauza, who piqued the trumpeter’s growing interest in Afro-Cuban rhythms. The two reconvened in the mid-1940s, along with conguero Chano Pozo, bandleader Frank “Machito” Grillo, and others to create Latin jazz, a highly danceable blend of Latin rhythms, jazz harmony, and improvisation. Latin jazz would also be touched by the cool school. In the 1960s, saxophonist Stan Getz, guitarist Charlie Byrd, composer and pianist Antonio Carlos Jobim, and others brought together the subtle textures, challenging harmonies, and relaxed rhythms of cool jazz and Brazilian samba in a popular style known as bossa nova.

Perhaps the most dramatic break with the jazz tradition came with free jazz and the atonal experiments of the late 1950s and 1960s. Pioneered by alto saxophonist and composer Ornette Coleman, free jazz represented a departure from Western harmony and rhythm in search of even greater freedom of expression. While still grounded in the blues, Coleman literally freed himself from Western musical traditions in an effort to more honestly portray the sounds of human emotion. To this end, he developed his own musical theory called “harmolodics” and avoided common song forms in his compositions. Still, even in its most liberated moments, Coleman’s music retained links to Western music and the bebop legacy of Charlie Parker.

**Swing On**

As the 1960s progressed, many jazz musicians found themselves increasingly marginalized; by the end of the decade, there seemed to be a new gulf between jazz and the general public. It was this divide that inspired Miles Davis and his colleagues to experiment with the electric instruments and rhythms of rock, a movement that earned the name fusion.

Jazz endured, however fractured, and by the 1970s the record companies, radio stations, and nightclubs began to reemerge. In some ways, the overall state of jazz had remained largely unchanged since bebop: an art form of individuals, dominated by no single style. Legends like alto saxophonist Benny Carter, vocalist Betty Carter, and bassist Charles Mingus practiced their art alongside fusion leaders like bassist Jaco Pastorius, pianist Herbie Hancock, and saxophonist Wayne Shorter, and talents like pianist Keith Jarrett, bassist Dave Holland, saxophonist Joe Lovano, and trumpeter Wynton Marsalis. Like Ellington himself, jazz and its practitioners were simply “beyond category.”

Today, jazz is found wherever there is music. It can be heard in nightclubs and concert halls, on TV and radio, and in classrooms across the country and around the world. Every day musicians young and old uphold the jazz tradition and create new legacies of their own. They play with swing and the blues and the spirit of irrepressible self-expression that gave rise in New Orleans at the turn of the century. One hundred years later, we still love to listen.
1700s

Africans are brought to America and forced into slavery. Their musical traditions, including percussion and call-and-response, influence American music and become the roots of spirituals and eventually, blues and jazz.

1800s

Immigrants from Europe flock to America bringing musical traditions like Irish jigs, French quadrilles, Spanish flamenco, German waltzes and more. In the late 1800s African American composer Scott Joplin inspires the popularity of “ragtime,” music that combines European compositional styles with rhythmic and melodic music from the African American community.

1900s

New Orleans, a prosperous American port city, attracts settlers from different countries and cultures. The multicultural atmosphere mingles European musical styles with the blues, ragtime, marching band music and other elements. Inspired by this musical blend, African American musicians create a new style of music known as jazz.

1920s

African Americans migrate in large numbers to northern cities including Chicago and New York, spreading the popularity of jazz and the blues. The jazz craze grows as a new generation embraces the high-spirited music as part of their rebellion against tradition. During the economic growth of the 1920s, radios and record players are widely available in stores for the first time, exposing a wider population to jazz.
1930s

The Great Depression plunges the nation into poverty. As many people can’t afford to buy records or go to clubs, the radio becomes the center of entertainment. The lively dance music of “Big band swing” provides a welcome escape from the hardships of the Depression, becoming the most popular music of the 1930’s and 1940’s.

1940s

From 1939-1945 many jazz musicians are drafted to fight in World War II, making it difficult to sustain the large dance bands of earlier times. Smaller jazz groups begin playing a new style of jazz. Called “bebop,” it is characterized by fast tempos, intricate melodies and complex harmonies. African American jazz bands continue to face racial discrimination by the record industry, clubs and audiences.

1950s

Television becomes America’s main source of entertainment, causing dance halls featuring jazz to close nationwide. As the big jazz bands dissolve, quintets and quartets emerge. Elvis Presley and other performers introduce a new style of popular music – rock n’ roll. Despite this competition and shrinking audiences, jazz musicians continue to explore their art form, producing complex and powerful music and taking jazz in new directions. For example, Latin and Afro-Cuban jazz – jazz with a Latin rhythm and sound – comes to the fore at this time.

1960s

African Americans conduct nonviolent protests against segregation, sparking the civil rights movement, which impacts almost every aspect of American life, including jazz. African American jazz artists had long resented the white owned record companies and clubs that controlled their income and, to some degree, their art. Artists become more insistent about their desire to break away from these establishments and control their own music.

1960s and on

In the 1960s musical artists begin blending jazz with different musical genres. Musicians like Miles Davis mix with rock and funk, creating “fusion.” Breaking away from traditional jazz structures and rhythms, musicians also explore a free-form jazz, called “free jazz.” In 1987, Jazz’s great influence and prominence in the international music scene prompted Congress to declare it a National Treasure. Congress confirms jazz “as a rare and valuable national American treasure to which we should devote our attention, support and resources to make certain it is preserved, understood and promulgated.”
Melody is the part of the song that you hum along to. It is a succession of notes that form a complete musical statement.

Harmony is the foundation of the melody. In contrast to the melody, which is usually played one note at a time, the harmonies of a song consist of several notes (called chords) played simultaneously. Played in time (according to the prescribed rhythmic meter), these harmonies provide musicians with a road map for improvisation.

The harmonies of a piece of music help to create the mood. When you describe a song as dark and mysterious, or bright and happy, you are often responding to the harmonies. In a typical jazz band, the harmonies are played by the piano or guitar, and bass. In a large ensemble or big band, the harmonies are also played by orchestrated horns.

Rhythm is one of the identifying characteristics of jazz. In jazz, a rhythm grows out of a simple, steady beat like that of a heartbeat. This pulse creates the foundation for the music, often remains constant and is usually maintained by the bass and drums, which “keep time” for the rest of the band. Sometimes a pulse is very slow (like in a ballad) and sometimes it is very fast (like in a bebop tune). Regardless of the speed (tempo), the pulse helps to anchor the music and provides a basic contrast for other, more interesting, rhythms that occur in the tune.

In some musical styles, the beat is subdivided into two equal parts. But in jazz, the beat is divided unevenly in a bouncy fashion, that implies
three, rather than two, subunits. Much of the energy in jazz lies in this irregularity of its rhythm and the deliberately unexpected accents. This is known as syncopation.

**Improvisation** is the spontaneous creation of music. When a musician improvises, he or she invents music at the moment of performance, building on the existing theme and structure of the song. Jazz generally consists of a combination of composed and improvised elements, though the proportions of one to the other may vary. In a jazz performance, the ensemble plays a chorus or succession of choruses during which an individual player has the opportunity to improvise. In collective improvisation, two or more members of a group improvise at the same time. Improvisation, both collective and otherwise, builds a relationship between the members of the ensemble, helping them to “talk” to one another. It allows musicians to be creative and share their personalities. By experimenting and developing individual styles of improvisation, musicians are able to challenge and redefine conventional standards of virtuosity.

**Blues** has many definitions; it is a type of music, a musical form, a harmonic language, an attitude towards playing music, and a collection of sounds. Mostly though, the blues is a feeling; whether happy, sad, or somewhere in between, its intention is always the same: to make you feel better, not worse, to cheer you up, not bring you down.

Born out of the religious, work, and social music of African Americans in the South during the late 1800s, the blues has since become the foundation of American popular music, including rhythm and blues, rock ‘n’ roll, country, and all periods and styles of jazz.

**Swing** is the basic rhythmic attitude of jazz. It is so important to the music that if a band can’t swing then it simply can’t play jazz well. In the words of the great Duke Ellington, “It don’t mean a thing if it ain’t got that swing.” Swing depends on strong coordination between the musicians and the style and energy with which they play. It propels the rhythm forward in a dynamic, finger-snapping way. Rhythm alone does not produce swing – it involves timbre, attack, vibrato, and intonation. The easiest way to recognize a swing feel is to listen to the drummer – try to hear the “ting-ting-ta-ting” of the cymbal.

Swing also refers to a specific jazz style that evolved in the mid-1930s, known as the Swing Era, which is characterized by large ensembles that play complex arrangements meant for dancing.

**Syncopation** is the rhythmic equivalent of surprise. It is the shifting of emphasis from what we hear as strong beats to weak, i.e., accenting unexpected beats. It is essential to a strong swing feeling.
Do jazz musicians make up what they play?
Improvisation is a very important part of jazz; it allows the musicians to put their personalities into the music and share themselves with their bandmates and their audience. Most jazz performances follow a form, which is a predetermined series of harmonies known as a chord progression. This means that while jazz soloists make up their own musical phrases, they generally follow a set of pre-existing chords and a prescribed meter. In a jazz performance, musicians often play in a format known as “head-solo-head.” The head refers to the melody, which is introduced in the beginning, followed by one or more choruses of improvisation, and concluded with a restatement of the melody, or head.

What do you listen for in jazz?
Jazz is like a conversation. Musicians communicate with each other and with the audience in musical sentences. They must listen to what is being said by their fellow musicians and respond appropriately, filling the music with the depth of their personality. They may reference other jazz performances, quoting material from other songs or solos, imitate the style or phrasing of another musician, or simply explore the emotional range of the song at hand.

How do jazz musicians learn how to improvise?
Just as toddlers learn to talk by listening and imitating language, jazz musicians develop a vocabulary by listening to and studying the music of previous generations of musicians. They also study the technical aspects of their instruments, ensuring that they can express themselves fluidly. Learning music theory along with melodic and rhythmic patterns expands their musical vocabulary. They incorporate all of these things into their own expressive phrases, telling an original and personal story.
What is song form?
In the same way that your schedule helps you find your way through the day, song form helps jazz musicians find their way through a piece of music. They establish the harmonic pattern, or chord progression, of the song, providing a road map for the improvising musician. Song forms come in many shapes and sizes, but the most common forms in jazz are the 12-bar blues and the 32-bar song form. Each time a musician plays through the harmonies of the form, he or she has completed a chorus, which can then be repeated over and over again.

What is the rhythm section?
A typical rhythm section is comprised of a piano and/or guitar, bass, drums, and various percussion instruments. It is the engine that propels the band and provides the rhythmic and harmonic foundation for the music.

The drummer keeps the time for the band, constructing and maintaining the groove in conjunction with the bass player. The drummer outlines the song form and provides a constant rhythmic commentary, accenting the cymbals or snare drum in response to the music.

The bass player provides both harmonic and rhythmic support, maintaining the groove by coordinating very closely with the drummer and outlining the chord changes with a walking bass line.

The piano player/guitarist also supports the harmonies and rhythms of the music. Unlike the bassist, who usually plays one note at a time, both pianists and guitarists can play many notes at once. They create rich harmonies that support both the melody and the soloist, and punctuate the music with rhythmic accents.

What is a typical jazz band?
A jazz band can consist of any combination of instruments. One person can play jazz and do it beautifully; most often though, a jazz band consists of a rhythm section and one or more horns and/or a vocalist. The band can be small like a trio or quartet, or a large big band with as many as 18 musicians. The big band generally consists of three to four trumpets, three to four trombones, four to five saxophones, and a rhythm section.

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Traditional Jazz Instruments

Acoustic Bass (Double Bass or Upright Bass): The largest instrument of the string family, which also includes the violin and guitar. Notes are produced when the strings vibrate. The double bass was first used in symphony orchestras. In jazz, the bass anchors the low notes that go along with the melody and helps keep the tempo steady. The electric bass is also used in jazz groups that play more contemporary styles. Usually played pizzicato without a bow. This is Marcus Shelby’s instrument.

Percussion: Drums, tambourines, wood blocks, triangles and other instruments.
The grouping of drums and cymbals used in a jazz group are called a trap set or “kit.” Percussion means to “hit things together”—even your hands become a percussion instrument when you clap. The drums cooperate with the bass to help keep the tempo steady.

Piano (includes electronic keyboard):
The piano is a member of the percussion family. Inside a piano are many wire strings. Notes are made when the felt hammers attached to the keys hit the piano strings, which is why it is considered a percussion instrument. The piano can play groups of notes called chords, which blend with the low notes played by the bass and the steady rhythms produced by the drums to produce the rhythm section sound.

Wind Instruments:
Saxophone and clarinet are members of the woodwind family. Woodwind players make their sounds with the help of a reed, which is a piece of cane wood strapped to the mouthpiece. Sound is produced when the player blows into the mouthpiece, which causes the reed to vibrate. To make the different notes, the woodwind player presses on keys that open and close holes on the sides of the instrument.

Brass Instruments:
Trumpet and trombone are members of the brass family. Brass players make sounds by blowing and buzzing their lips in a mouthpiece that looks like a small cup.
A trumpet may look short, but it is actually made up of many feet of brass tube. Sound is created with the trumpet by pressing buttons to open and close different sections of the brass tube. A trombone player slides a long piece of brass tube up and down to sound different notes.

Guitar: Another member of the string family, the guitar plays chords and is featured in some jazz groups. Sometimes the guitar is the only chord-making member of the group.
Music (Grades K-12)

Creating an Original Blues Song

The Blues are the foundation of jazz and other types of American music. It is a creative mode of musical communication. There are many forms of the Blues, but the most popular are the 12-bar blues. This form usually has a statement, the repetition of that statement, followed by a resolution or response, as seen below in the lyrics of “Backwater Blues” performed by the great Blues singer Bessie Smith.

- Print out copies of “Backwater Blues” and hand these out to your students.
- Play them Bessie Smith’s “Backwater Blues.”
- Brainstorm together some issues or themes that have come up in your class or school.
- Ask students to choose their own issue or theme and create blues lyrics using a similar form as “Backwater Blues.”
- In small groups, have students share their lyrics with each other.
- Reflect together on the experience of creating blues songs.
BACKWATER BLUES

WHEN IT RAINED 5 DAYS AND THE SKY TURNED DARK AS NIGHT
THEN TROUBLE TAKIN' PLACE IN THE LOW LANDS AT NIGHT

I WOKE UP THIS MORNIN' CAN'T EVEN GET OUT OF MY DOOR
THERE'S ENOUGH TROUBLE TO MAKE A POOR GIRL WONDER WHERE SHE WANT TO GO

THEN THEY ROW'D A LITTLE BOAT ABOUT 5 MILES 'CROSS THE POND
I PACKED ALL MY CLOTHES SO THE MINUTE THEY ROW'D ME ALONG

WHEN IT THUNDERS AND LIGHTENIN' AND THE WIND BEGINS TO BLOW
THEN THOUSANDS OF PEOPLE AIN'T GOT NO PLACE TO GO

THEN I WENT AND STOOD UP ON SOME HIGH OLD LONESOME HILL
THEN LOOKED DOWN ON MY HOUSE WHERE I USED TO LIVE

BACKWATER BLUES THEN CAUSED ME TO PACK MY THINGS AND GO
CAUSE MY HOUSE FELL DOWN AND I CAN'T LIVE THERE NO MORE

HMMM..I CAN'T MOVE NO MORE
THERE AIN'T NO PLACE FOR A POOR OLD GIRL TO GO
Building an Ensemble
To be successful, an orchestra requires every musician involved to work together as an ensemble.

- Have a student tap a rhythm on a found object or percussion instrument and ask others to copy it. Another student can introduce a complementary beat.
- When the rhythm is strong, students can take turns creating variations on top of the steady rhythmic theme.
- Ask each student in the group to take a turn as soloist. (Objects found in the classroom can be turned into musical instruments.)
- Reflect together on the experience of being a soloist and an ensemble member.

Musical Improvisation
Introduce improvisation using a common short phrase, such as a name.

- Have students turn this spoken phrase or word this into a musical phrase based on the natural rhythm of it, or the tonal inflections someone gives it, etc.
- From there, ask students to choose more concrete musical structures, such as a piece already familiar to the students, for example, “Twinkle, Twinkle, Little Star.”
- Encourage students to modify the melody, introduce new elements, create counterpoint, and “call and response” with another student.
- Share some of the improvised songs, then reflect together on the students’ experience.

Visual Arts and Music (Grades K-6)

Visual Improvisation to Music
Many visual artists use improvisation when creating their artwork. For example, painter Romare Bearden considered himself an improviser, creating rhythms and melodies on the canvas that felt spontaneous.

- Play selected music and provide students with a variety of art supplies.
- Create visual images in response to the music. Notice the tempo, tension, feelings, harmony and how the musical elements convey emotion or ideas.
- Try making a collaborative improvised artwork by passing a drawing or painting around the classroom.
- Reflect together afterwards: Did you decide what to paint, draw or sculpt? Was it planned? Was it spontaneous?

Literacy, Music & Theater Arts (Grades 1-5)

Group Story Improvisation

- Sit in a circle and tell a collective short story. One student begins the story and then students take turns in order around the circle adding a sentence or two.
- Give the story a beginning, middle and end and a consistent flow of voice. Try new topics.
- As students become comfortable, add a pulse to the delivery using simple percussion instruments or clapping, etc. Students can contribute their lines in rhythmic patterns.
- The short stories can be recorded, listened to, and evaluated for the flow of content, divergence from the original topic, etc.
- Reflect together afterwards: How did it feel to speak without time to prepare? Did the percussion element make the improvisation easier or more difficult?
**Arrangement:** The organization of a musical work for a given ensemble that determines which instruments play when, what harmonies will be used, what rhythmic groove, and where improvisation occurs.

**Big band:** A style of orchestral jazz that first surfaced in the 1920s and blossomed during the Swing Era (1935-1950) when it became the popular music of the day. Big bands feature three sections (brass, woodwind, and rhythm) and generally play carefully orchestrated arrangements often meant for dancing.

**Blues:** African American music developed in the South during the mid-1800s. Both a style, a musical form, a harmonic language, and an attitude towards playing music, the blues is the foundation of most American popular music.

**Blues form:** A typical blues consists of 12 measures, divided into three sections of four measures each, with a harmonic progression based on three chords. Blues forms can also be 4, 8, or 16 measures long; nearly any jazz composition can be played with a “bluesy” feeling.

**Blue note:** Any note that is bent or smeared, generally a half step away from the diatonic note.

**Call and response:** A musical conversation in which instrumentalists and/or vocalists answer one another.

**Chord:** Three or more notes played at the same time, creating one sound. The harmonic structure of most songs is comprised of a progression of different chords on which soloists improvise.

**Chorus:** The playing of a complete song form. When a musician solos, he or she may improvise several choruses in succession.

**Collective improvisation:** When two or more musicians improvise at the same time; also known as polyphonic improvisation.

**Downbeat:** The first beat of each measure.

**Groove:** The interaction of rhythms to form a pattern.

**Jam session:** An informal gathering of improvising musicians.

**Riff:** A short, repeated musical phrase used as a background for a soloist or to add drama to a musical climax.

**Solo:** When one musician improvises, usually within the structure of an existing song.

**Syncopation:** A rhythmic accent or emphasis on an unexpected beat.

**Scat singing:** A vocal technique that uses nonsense syllables to improvise on the melody.

**Standard song form:** Popularized in the 1920s and 1930s, the standard song form is usually 32 measures long; it can often be heard as 4 distinct sections, each 8 measures long.

**Swing:** The basic rhythmic attitude of jazz, it is based on the shuffle rhythm and it propels the music forward. Swing also refers to a style of jazz that first appeared during the 1930s and features big bands playing complex arrangements, usually for dancing.

**Texture:** The atmosphere created by the combined sounds of musical instruments and harmonies.

**Timbre:** The tonal quality of a voice or instrument; for example, an artist’s timbre may be described as raspy and rough, or smooth and clear.
Resources

Websites:
Marcus Shelby:
http://marcusshelby.com/
http://urbanmusicpresents.com/marcus-shelby

Duke Ellington:
http://www.dukeellington.com/

Online Videos:
Marcus Shelby Orchestra- “We’re a Winner” – Soul of the Movement, 2011, http://www.youtube.com/watch?v=5gIK666kgUK.
Duke Ellington:
“It Don’t Mean A Thing”: http://www.youtube.com/watch?v=cb2w2m1JmCY
“Take the A Train”: http://www.youtube.com/watch?v=cb2w2m1JmCY
“Mood Indigo”: http://www.youtube.com/watch?v=GohBkHaHap8

Selected Recordings
Marcus Shelby:

Duke Ellington: Ellington at Newport, 1956 (Complete), Columbia; The Blanton-Webster Band (3-CD set), RCA/Bluebird Records, 1940-42.


Recommended Readings


The Golden Age of Jazz (photography) by William Gottlieb (San Francisco: Pomegranate Communications, 1995).


San Francisco Bay Area Jazz and Bluesicians by Jessica Levant and Linda McGilvray (San Francisco: Jessica Levant Photo Art, 2013).


Children’s Books
Duke Ellington: His Life in Jazz with 21 Activities by Stephanie Stein Crease (Chicago Review Press 2009)


Duke Ellington (Getting to Know the World’s Greatest Composers) by Mike Venezia (Childrens Press Chicago, 1996)

I See the Rhythm by Michele Wood (San Francisco: Children’s Book Press, 1998).

DVDs


Internet Resources on Jazz

International Association of Jazz Educators: www.iaje.org

IAJE promotes the understanding and appreciation of jazz and its heritage, and provides resources for educators.

Jazz for Young People Curriculum Online: www.jazzforyoungpeople.org

This site provides students, teachers, and the general public with music clips, video footage, engaging biographies, and activities that explain core concepts and major figures of jazz.

NEA Jazz in the Schools: www.neajazzintheschools.org

Designed primarily for high school social studies, American history, and music teachers, this web-based curriculum (and free DVD toolkit) takes students on a step by step journey through the history of jazz, integrating that story with the sweep of American social, economic, and political developments.

NPR Jazz: www.nprjazz.org

National Public Radio offers a range of insightful jazz programming and in-depth profiles of jazz artists past and present.

PBS Jazz, A Film by Ken Burns: www.pbs.org/jazz

This site, based on the 2001 series, offers a wide array of resources, including an excellent timeline, biographies and music clips.

Jazz West.com: http://www.jazzwest.com/index.htm

Local calendar, directory and more for jazz in the Bay Area.

Local Venues featuring Jazz

Cal Performances, Berkeley www.calperformances.org

University of California Jazz Ensembles http://ucjazz.berkeley.edu/

The Jazzschool, Berkeley www.jazzschool.com/

SF Jazz www.sfjazz.org/

Yoshi’s Jazz Club, Oakland & San Francisco www.yoshis.com
Music Grades K-12

1.0 ARTISTIC PERCEPTION
Processing, Analyzing, and Responding to Sensory Information Through the Language and Skills Unique to Music
Students read, notate, listen to, analyze, and describe music and other aural information, using the terminology of music.

2.0 CREATIVE EXPRESSION
Creating, Performing, and Participating in Music
Students apply vocal and instrumental musical skills in performing a varied repertoire of music. They compose and arrange music and improvise melodies, variations, and accompaniments, using digital/electronic technology when appropriate.

3.0 HISTORICAL AND CULTURAL CONTEXT
Understanding the Historical Contributions and Cultural Dimensions of Music
Students analyze the role of music in past and present cultures throughout the world, noting cultural diversity as it relates to music, musicians, and composers.

3.1 Describe the social functions of a variety of musical forms from various cultures and time periods (e.g., folk songs, dances).

Diversity of Music
3.2 Identify different or similar uses of musical elements in music from diverse cultures.
3.4 Describe the influence of various cultures and historical events on musical forms and styles.

4.0 AESTHETIC VALUING
Responding to, Analyzing and Making Judgments about Works of Music
Students critically assess and derive meaning from works of music and the performance of musicians according to the elements of music, aesthetic qualities, and human responses.

Duke Ellington with an “orchestra” of instruments.
**10 Acknowledgments**

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**About Cal Performances and Cal Performances in the Classroom**

The mission of Cal Performances is to inspire, nurture and sustain a lifelong appreciation for the performing arts. Cal Performances, the performing arts presenter of the University of California, Berkeley, fulfills this mission by presenting, producing and commissioning outstanding artists, both renowned and emerging, to serve the University and the broader public through performances and education and community programs. Cal Performances celebrates over 100 years on the UC Berkeley Campus.

Our Cal Performances in the Classroom and SchoolTime program cultivates an early appreciation for and understanding of the performing arts amongst our youngest audiences. Workshops and classroom visits prepare students for deeper engagement when they experience hour-long, daytime performances by the same world-class artists who perform as part of the main season. Cal Performances in the Classroom and SchoolTime have become an integral part of the academic year for teachers and students throughout the Bay Area.
Cal Performances in the Classroom educational materials were written, edited and designed by Laura Abrams, Rica Anderson, David McCauley and Marcus Shelby, with material adapted from Jazz at Lincoln Center’s Jazz 101 guide, pbs.org and the Kennedy Center’s Cue Sheet on jazz.

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