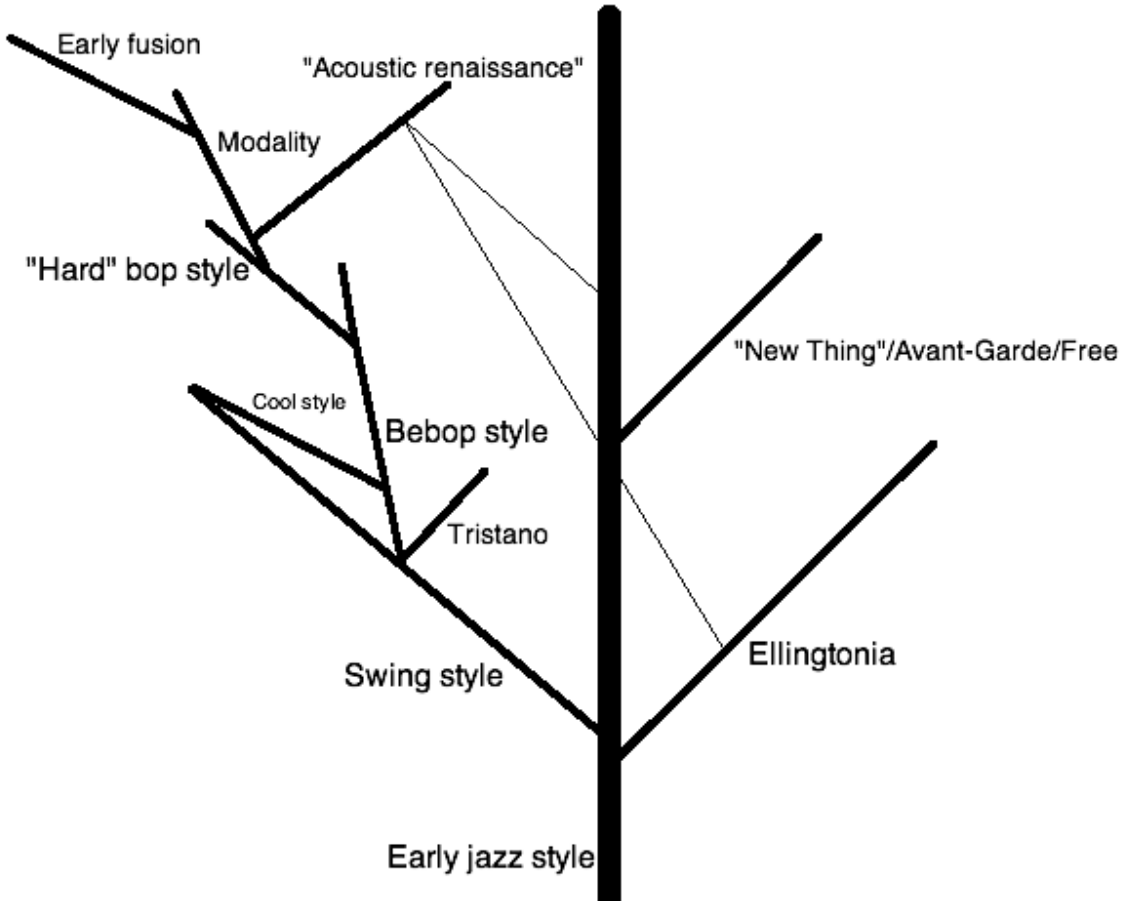
A Crash Course in Jazz History and Style for the Novice Jazz Educator

Many fine educators have not had any formal jazz training. This is unfortunate on a number of levels: the study of jazz is fascinating and integral to one's understanding of the American 20th century, and, of course, to all American music created today. From a more practical point of view, many music educators are asked to run a jazz ensemble (and even a combo) while, through no fault of their own, they have no experience with the music at all. My ultimate hope is that, someday, all universities will require Music Education majors to participate in jazz ensemble and take jazz pedagogy and history courses. While an article on its own can't remedy this situation, I'd like to provide those educators with a basic understanding of the music.

Jazz history and style are inextricably linked; the music's brightest voices have always had their own distinctive styles, some of which spawned movements on their own and changed the way the "mainstream" jazz of the day was played. Some people think of jazz history as a continuum; that music has gone through *phases* or *periods*. This implies that certain styles are fleeting and are given up by everyone when the hot new style comes along. This is over-simplistic and just not the case. Think of jazz history more as a tree:



Older styles continue even when new ones emerge. For example, there are people today who play in an "early jazz" style, even though many other movements have emerged since.

What follows is by no means a comprehensive text; not even close. This is meant only to give a broad overview to someone who may have not otherwise gotten one:

Early Jazz: Morton, Armstrong, Beiderbecke

The first recording of jazz we have is from 1917, and the *way* musicians played remained largely unchanged throughout the next decade (with two notable exceptions--more on that in a moment). Musical characteristics of this period involve a general "staccato" or "vertical" feeling to the music: horn players tongued almost every one of their notes, the rhythmic emphasis was on all four beats of the measure, phrasing was almost ahead of the beat, and the quarter note was king. The groups were pretty small: two or three horns (including clarinet, an instrument indicative of this period), percussion, a bass instrument (tuba, string bass, or bass sax), one or two chordal instruments (piano and/or banjo).

In the 1920's, all the musicians agreed where the beat was to be placed and *clearly outlined it*. The groups played intricate arrangements with limited solos; the emphasis was on the *group.* When solos were played, a lot of the time they were overlayed on each other, resulting in complex *collective improvisation* with trumpet taking the melodic lead. One of the first people to *arrange* the music in a complex way was Jelly Roll Morton. His groups laid the foundation for what would become "big band" jazz in the following decade. His groups in the early '20's adhered to the group dynamic; solos were always in service of the arrangement and weren't the focus of the music.

In the mid-late 1920's, emphasis shifted from the *group* to the *soloist.* Undoubtedly the figure that accomplished this was Louis Armstrong. Armstrong was the first true innovator of the music; he was a natural jazz musician who couldn't help but reinvent the sounds he heard around him. He was to jazz what Michael Jordan was to basketball--he was simply born to play and did so better than anyone ever had (some say ever *will*). A primary stylistic innovation of Armstrong was that he played with less

articulation...he heard the mostly staccato music of the day a little more legato than everyone else. But this innovation is overshadowed by his virtuosic trumpet playing. He made it so that the *solo* would become the primary focus of jazz, not the *ensemble*.

Group size	Articulation	Aesthetic	Phrasing (feel)
5-9 musicians	Staccato, most notes are tongued	Group sound; collective improvisation; heavy, vide vibrato	Quarter note-heavy; downbeat-oriented; ahead or on-top of the beat

Armstrong's counterpart was a young man named Bix Beiderbecke. Beiderbecke was the understated antithesis to Armstrong's outspokenness. It has been said that Beiderbecke *invited* you to listen while Armstrong *commanded* it. Like Armstrong, Bix heard the music in a slightly more legato way, and helped pave the way for the 1930's *Swing style.*

Swing Style: Basie and Ellington

Into the 1930's, jazz became the popular music of the day and people needed it to be easy to dance to which required larger, louder bands. Here is the birth of what we now call the "big band", although in a smaller form than how we think of it today. There are three main differences between Early Jazz style and Swing Style:

- Groups increased in size
- Improvised solos became more important within arrangements
- In general, the music became slightly more legato (articulation becomes less frequent)

As big bands became more popular, naturally more and more emerged to fill the growing demand. Without question, however, two bands were the stylistic leaders of the 1930's and early '40's: Count Basie and Duke Ellington.

Basie and Ellington are important to us for many reasons beyond their popularity at the time. These two bands represented slightly different trajectories within the big band tradition, and consistently churned out music that was innovative, influential, and

above all else, *high-quality*. Like Armstrong and Beiderbecke during the previous decade, the two bands were able to highlight their uniqueness within the prevailing style of the day.

Soloists

Like any sports team, the big bands had their stars, and these two groups were no exception. Count Basie's tenor saxophonist Lester Young was the most important among a slew of excellent soloists, while Ellington's leading man Ben Webster provided the gruff alternative. These two soloists are kinds of microcosms of each band: Young favored a legato, smooth phrasing style while Webster was grittier and, in a way, based his sound more on the prior decade. Young was a radical glimpse of the future while Webster used the past more to his advantage.

Orchestration

Ellington's sonic palette was infinite; he would create sounds never heard before and each piece had its own texture. He used clarinet quite a bit in the saxophone section, chose three trombonists instead of four, and often incorporated specific talents of his band members into his arrangements (Ray Nance would play violin as well as trumpet, and would even sing). Ellington's orchestra was as much a reflection of his voice as his piano was. The music was more gestural and less straightforward, and in a way used sounds of Early Jazz styles to further his goal. Basie's primary goal was groove...orchestration didn't change much from one piece to the next, but all the pieces had a natural swing feel to them. With Basie, you knew what you were getting and the band played in the Swing style better than anyone. His band pioneered a specific rhythm section sound, always using guitar to play quarter notes and enhance the groove. It was not experimental, but Ellington was.

Legacy

Basie's group of the 1930's and early '40's laid the groundwork for what could be termed "straightahead" big band styles of the future. The pieces of the Basie band would translate well to most any other ensemble, and the rhythms, voicings, and aesthetic were very influential and palatable. Ellington basically created a vocabulary and trajectory that stands alone because what he wrote was so unique to his specific band. It's more difficult to replicate, more stylistically specific, and generally more abstract. But one could say that that aesthetic has influenced "left-of-center" composers such as Gil Evans and Maria Schneider. Certainly the work of Wynton Marsalis borrows heavily from Ellington, but he was one of the few figures able to find something truly unique.

Group size	Articulation	Aesthetic	Phrasing
15-16 musicians for a big band	Smoother, less tongue than earlier styles	Big band emphasized group sound with soloists gaining more freedom within arrangements. Collective improvisation vanishes	Downbeats remain important, but soloists use 8th note lines more

Bebop style: Charlie Parker

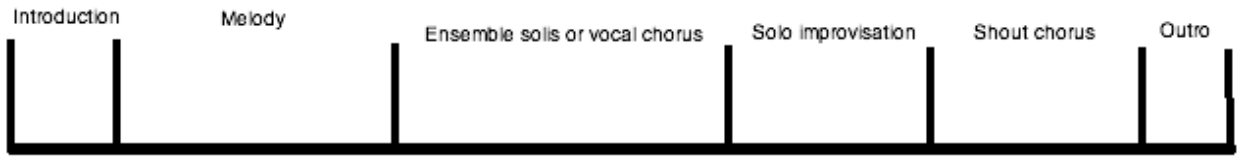
The 1930's and early '40's was a boom-time for jazz musicians. They got to play all the time for audiences that were enamored with the music. Like all positives, this came with some negative side effects, though. A naturally curious breed, the musicians began to search for more complexity in the music as they got more and more sophisticated. However, "stretching out" creatively is not what dancing audiences were interested in hearing, so after hours, some of the more improvisation-minded players would get to together and play---it was during these jam sessions that the musicians could solo for as long as they wanted, experiment with new techniques, and feel free of any restriction that the tightly-written big band arrangements had placed on them.

Charlie Parker, who would emerge as the leader of the next major stylistic shift in jazz, was originally a sideman with trumpet great Dizzy Gillespie, who basically (along with several others) invented "Bebop" stylistic traits along with Parker. Eventually however, Parker ("Bird") would become the epitome of Bebop and truly can be credited with much of the innovations himself. This new style formulates in the early 1940's and by 1945, it has coalesced into a true movement.

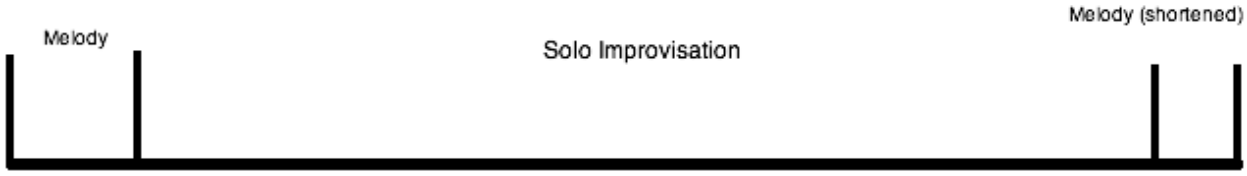
As one would expect, since the Bebop style was reactionary in nature, removing any sort of "shackle" felt by members of larger bands, much of the traits of this kind of music are polar opposites of Swing stylistic traits: tempos become on the whole faster, complex and virtuosic solos are the focus of the songs, groups become much smaller, vibrato lessens and becomes terminal, and, most importantly, *the rhythmic emphasis is freed from the downbeat*. This means that musicians prior to Charlie Parker used the downbeats of measures to guide their rhythms, while musicians who adopt the new style lock their rhythm to whatever part of the measure they want---downbeats or upbeats.

To give an example of how reactionary the Bebop style truly is, take a look at this formal chart. You can see that the soloist is now the focal point as opposed to the arrangement:

Typical form of a 1930's big band piece

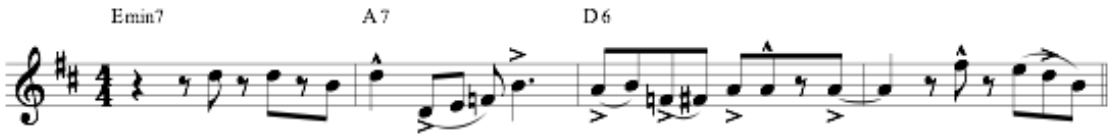


Typical form of a late 1940's small group performance

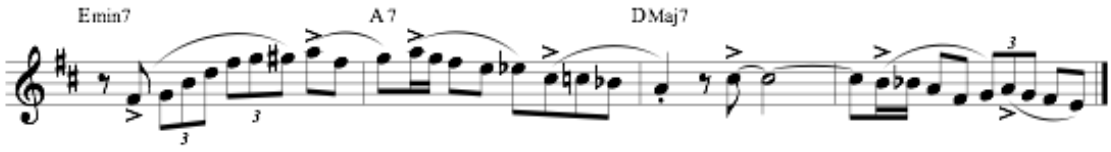


The Bebop style of articulation, phrasing, and form has arguably been the most influential of all jazz movements. In a fundamental sense, most jazz musicians today play the way that Charlie Parker did in terms of which notes in a phrase are tongued and accented. Particularly the use of this form: *Melody, extended solos, melody* is the template for the majority of jazz performances today, especially in informal settings. See the example below:

Typical Swing-style improvisation



Typical Bebop-style improvisation



We see that not only are the lines longer and less tongue is used in Bebop, but different alterations are chosen over the V7 chord to accommodate for scalar motion. The accents are all over the measure in Bebop, particularly on the upbeats within a given line. Lastly, the sound of the Major 7th chord is preferred over the Major 6th on the arrival chord.

Group size	Articulation	Aesthetic	Phrasing
4-5 musicians	Even smoother, tongue is used mostly for accenting.	Small groups and individualism during solos are paramount	The downbeats of the measure no longer form the basis for which notes are emphasized. There is a huge differential between accented and unaccented notes (rhythmic flare).

Cool Style: Miles Davis and "Birth of the Cool"

Even though Miles Davis began to cut his teeth in Charlie Parker's groups, there was always something about him that didn't really fit the bebop mold. His playing was less precise than true adherents to that style; there was a vulnerability in his playing that always made him a little out of place in those fast tempos and flurries of notes. As Miles gained popularity toward the late 1940's, he began to explore his first in a series of major stylistic innovations over the coming decades. The important thing to remember, though, is that from an articulation and phrasing standpoint, Miles basically always played the same, no matter what was happening behind him. He surrounded himself with many different creative environments, but his personal style was pretty much established in the late 1940's with the album *Birth of the Cool*.

BOTC was released in 1949 and, like Bebop, was a reactionary movement. It used 9 musicians and limited solo space for improvisors; the arrangement was now the focus again. If Bebop styles are overtly masculine and aggressive, Cool styles are vulnerable and understated. Miles and his cohorts invented the Cool style (which was influenced heavily by the playing of Lester Young), and then Miles promptly moved on to other things while the movement itself was carried on by other musicians. The stylistic considerations of Cool jazz were the basis of the "third stream" movement which was a combination of classical/orchestral music and jazz. This may be because the Cool style de-emphasizes the rhythmic fireworks of Bebop and further smoothes out articulation and swing feel.

Miles would go on to lead pioneering groups in subsequent movements and can be attributed with creating the defining sounds in Hard Bop, Modality, and 1960's Avant-Garde (see below).

Group size	Articulation	Aesthetic	Phrasing
Non-specific, but "third stream" cool jazz uses classical instruments and larger ensembles	Very smooth; tongue is used like Parker	Understatement, introspection, effeteness	Back-of-the-beat phrasing is common, accents are de-emphasized

From this point forward in the history of jazz styles, we begin to see more of an individualistic approach; that is, as we see in jazz today, each musician or group comes up with their unique sound which can fit into a general popular concern, but ultimately is more interested in itself than adhering to a movement of any kind. In other words, there are "movements", but musicians are more concerned with finding their own way than necessarily taking cues from others. *In a fundamental way, we are all still playing using the Bebop style---that's how revolutionary Charlie Parker was.* The difference between this and earlier changes in jazz style, like Bebop or Swing, is that while those were changes to *fundamental* aspects of playing (legatizing, upbeat phrasing), the following movements are changes to *superficial* aspects of playing (a general mood, song construction). We'll point out a few of the more interesting and influential ones (continuing chronologically):

Hard Bop

Charlie Parker was such a tremendous innovator and influence to everyone in the late 1940's into the '50's that when he died in 1955, there was a gaping hole in the jazz stylistic world. The question of how to deal with the legacy Bird left behind was on everyone's mind. The style he created (Bebop) was the most influential and revolutionary since Louis Armstrong, and luckily, the jazz scene of the 1950's was one of the most productive and creative in all its history. Many musicians were creating music based on Bebop styles and form, but with more emphasis on the blues. The mainstream sound that emerged in the mid-1950's into the 1960's is generally known as "Hard Bop" or "Post-bebop", and can be seen as a melding of Bebop style, Cool style, and the blues. Note that this, like all subsequent points touched on here, is not really a

style as much as it is a *movement.* It's official beginning occurred in 1955 when Charlie Parker died and Miles Davis formed his first classic quintet featuring saxophonist John Coltrane.

Miles Davis's group is basically a re-imagining of Charlie Parker's style. Ultimately though, this group has a sound of its own, as do most other groups from this period. Some other groups of the late-1950's that fit this mold:

Clifford Brown/Max Roach
Horace Silver
Art Blakey and the Jazz Messengers
Benny Golson/Art Farmer

These groups all use the Bebop style and form as their basis, but are not necessarily influenced by a contemporary "leader" of any kind (Miles Davis's group comes the closest).

Modality: Miles Davis and John Coltrane into the 1960's

In 1959, Miles Davis continued to experiment with his seminal album *Kind of Blue*. This is the quintessential "Modal Jazz" album, perhaps inadvertently creating a new group sound which has since become part of every ensemble to emerge since. Jazz Modality can be defined as follows:

- A style of improvising using modes instead of scales
- A style of composing using modes
  -Chords eschew tonality
  -Chords last longer than they used to
- A general mood or feeling
  -Ranges from player to player, but ranges from introverted or tumultuous
- An influential movement within jazz history
  -Even if not consciously influenced by modality, it has become a part of most jazz since

Davis continued to explore music without tonality with increasing freedom as the 1960's progressed. He was perhaps the strongest judge of musical potential to ever live, and hired young promising musicians over and over again, but John Coltrane is the standout:

John Coltrane is an interesting example of a personal style post-Parker paving its own way: arguably the most influential tenor saxophonist ever, Coltrane began his career playing very much in the style of Parker himself---a kind of re-imagining of

Parker's style with Trane's own twist on it. He was an important part of 1959's *Kind of Blue*, but that very same year, he released an album on his own called *Giant Steps* which introduced a technique he invented: the Coltrane chord substitution pattern. In the years leading up to *Giant Steps*, Trane became increasingly interested in implying chord substitutions while playing, cramming in as many additional implied chords as he could within a song. However as the 1960's progressed, his own groups began to play songs with fewer and fewer chords (a technique likely influenced by the Modal movement), so much so that, by Trane's death in 1967, his songs did not have any real harmonic structure whatsoever. This is reminiscent of the music pioneered by Ornette Coleman:

The "New Thing": Ornette Coleman and the Avant-Garde

In the late 1950's, alto saxophonist Ornette Coleman presented a style to the world with his album *The Shape of Jazz to Come* which was another type of reaction to Charlie Parker's music. An obvious admirer of Bird's style, Coleman produced music which fought back against the harmonic complexity of the Bebop style and raised melody up to be the most important aspect of the music. This is, purposely or inadvertently, a throwback to jazz styles that originated before Bird, where improvisors placed the creation of melodies at the top of their priority list. Coleman chose not to use any chordal instruments (piano, guitar, etc), which allowed him and the rest of the groups even more freedom as they improvised. Coleman's innovations and Coltrane's later music inspired a huge movement deemed the "New Thing", "Free Jazz", or the "Avant-Garde", where structure either didn't exist, or was implied very freely. Much of the time, music produced in the wake of this movement tends to be aggressive, harsh, and more concerned with the creation of textures and sounds.

Fusion: Miles Davis into the 1970's

Davis was relentless in his pursuit of new sounds and ideas, and was the pioneer of a kind of ethereal blending of rock rhythms and jazz sensibilities of the late 1960's called "Fusion" (implying the fusion of jazz and rock). Early Fusion, i.e. that which was produced in the late 1960's, was very much an extension of the openness of Modality and the freedom of "Free Jazz", and most definitely leaned more in the direction of experimental jazz than rock. As the 1970's progressed, more groups involved in this movement began to use electronic instruments like electric bass, Fender Rhodes keyboard, or other electronic keyboards.

An important thing to note here is that the *aesthetic* of mainstream jazz during the 1970's began to change so that even musicians not adhering directly to the Fusion movement favored sounds popular in rock and pop music of the day:

- Double-bassists utilize amplifiers which increase the treble end of the spectrum
  -In studio recordings, many bassists use the “direct input” or “DI” method, which compresses the bass sound and decreases its acoustic characteristics
- Pianists favor brighter-sounding instruments or even electronic keyboard sounds
- Drummers use larger drum sets with large, deeper-pitched toms and bass drums and “drier” (less resonant) sounds
- Wind players (especially saxophonists) favor brighter, more compressed sounds

The Acoustic Renaissance: Wynton Marsalis

In the early 1980’s, it had become time for another reactionary movement. The rock-based aesthetic of the 1970’s had run its course and the stage was set for someone to take hold of the jazz scene. The person that filled this void was one of the most prodigious, talented, and ultimately controversial jazz musicians to ever emerge: trumpeter Wynton Marsalis (and, to a lesser extent, his brother Branford). As the ’80’s began, young Wynton expressed disillusionment with what he saw as a surface-level approach to jazz performance as some musicians embraced pop-music trends of the day and, to some, began to “dilute” jazz and remove its artistry.

Marsalis championed a return to earlier jazz forms that were not influenced by the Fusion movement; he felt that jazz had been corrupted as it attempted to become more inclusive of pop and rock techniques. As his career progressed, Marsalis championed more and more “early” movements and musicians whom he felt were examples of how to appropriately play jazz. He believed (and indeed still does) that jazz musicians should be knowledgeable about as much jazz history as possible, and strive to incorporate influence from all eras of the music.

Perhaps one of Marsalis’s most influential contributions has been the sea change for almost all modern jazz to return to its acoustic roots---that is, he believed that jazz should be as natural and acoustic-sounding as possible, eschewing the use of bass amplifiers and overtly artificial sounds. This aesthetic did not really take hold through the 1980’s as most recordings we hear use the treble-centric, compressed, and bright sounds adopted in the 1970’s. As the 1990’s approached, however, Marsalis’s acoustic aesthetic began to take hold in the jazz mainstream, and by 1995, *most* jazz musicians were on the acoustic bandwagon. We now see the majority of jazz recordings striving to use sounds which are as acoustic and natural as possible.

Jazz today

There is no prevailing movement that encompasses today’s jazz musicians. Because of the wide availability of recordings from any era in jazz, and for that matter,

jazz musicians' growing eclectic tastes in all kinds of music, there is a holistic approach to jazz style now. Musicians are basically a stylistic mishmash of everything that has come before (but predominantly, phrasing used before Charlie Parker is not used in the mainstream). We basically pick and choose which styles to focus on, and make our own. This approach to jazz began after Charlie Parker's death and continues to this day. However, the acoustic or natural instrument sound pioneered by the Marsalises in the early 1980's has remained the preferred quality.

The case could be made that every major movement within jazz's progression has served to emphasize the *legato* aspects of the music and de-emphasize the *staccato* ones. The tongue is used less, 8th notes become less swung and more straight, and time feel is not delineated as clearly. So whenever we play jazz, it's very important to realize what style the music is coming from and "legatize" or "staccatize" appropriately. This one aspect alone can make the difference between a mediocre performance and one that jumps off the page.