

## Working within the system: teachers of English learners negotiating a literacy instruction mandate

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Received: 14 January 2010 / Accepted: 8 October 2010 / Published online: 4 November 2010  
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**Abstract** In an effort to reverse the reading crisis purported to plague public education, schools and districts are mandating prescriptive reading programs and teacher-centered instructional practices in hopes of improving the academic achievement of minority students, including English learners (ELs). The widespread implementation of these programs in schools and classrooms serving ELs is particularly striking in California, where there are large numbers of ELs, as these programs were developed for monolingual, English-speaking children, not ELs. Drawing on interviews with 32 teachers in four Northern California elementary schools serving primarily ELs from Latino backgrounds, we found that most teachers required to use one such program, Open Court Reading (OCR), did not think that it addressed the needs of ELs or tapped into their interests and/or understandings. That is, the top-down, one-size-fits-all policy mandate was not grounded in an understanding of ELs' language and literacy instructional needs. In light of our findings, we support policies that enable teachers to provide quality instruction that addresses the needs, interests, and understandings of all students, particularly ELs, who are often the, most underserved. This includes policies that promote the development of reflective, inquiring, and knowledgeable teachers who, in collaboration with colleagues and other educational stakeholders, play a key role in the policy making process.

**Keywords** English language learners · Mandated policies · No Child Left Behind · Teacher expertise

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In response to state and federal policies and educational initiatives intended to address differential achievement among students in U.S. schools, many local school districts have mandated prescriptive programs and teacher-centered instructional practices in hopes of improving the academic achievement of minority students, many of whom are English learners (ELs). This trend has included efforts to enforce language education policies related to the way school-based personnel should approach literacy instruction for these students, and has been particularly evident in the increasing number of districts that require elementary teachers to implement commercial reading programs (Altwerger et al. 2004; Fang et al. 2004). One of these programs is SRA/McGraw-Hill's Open Court Reading (OCR) (SRA/McGraw-Hill 2004), which has been widely implemented in schools throughout the U.S.; this includes California, where we work and where English learners (ELs) comprise 25% of the student population (Achinstein et al. 2005; Gándara and Baca 2008; Moustafa and Land 2002).

The widespread implementation of the OCR program with ELs is notable as it was not developed for this population, but for monolingual, English-speaking children (Rumberger and Gándara 2004). Moreover, researchers examining its use with this population have not found it to be effective in improving the reading performance of ELs (Gutiérrez et al. 2000; Moustafa and Land 2002; Ruiz and Morales-Ellis 2005). Furthermore, research has revealed the negative impact of OCR on EL students' biliteracy development and enthusiasm for reading, as well as on teachers' ability to instruct based on students' needs (Pease-Alvarez and Samway 2008; Ruiz and Morales-Ellis 2005).

In the current language education policy environment of the U.S., teachers of language minority students are frequently required to comply with top-down initiatives, including mandates requiring them to use OCR; these initiatives originated at the federal level through the No Child Left Behind Act (NCLB) and were then implemented through district and state policy mandates. The top-down initiatives often did not take into account individual students' needs or teachers' pedagogical preferences (Harper et al. 2008; Hassett 2008), a phenomenon that has been reported on in other countries (e.g., Bloch et al. 2010; Hélot and Young 2006; Valdivieso 2010). For example, in a recently-published volume, several researchers in different countries describe how teachers were expected, to varying degrees, to surrender their professional agency to individuals and institutions that oversaw their work (Menken and García 2010b).

Some research conducted in the U.S. has portrayed teachers as yielding to policies that have a profound and negative impact on English learners' opportunities to learn in school (Gándara 2000). While our experiences as classroom-based researchers and teacher educators confirm this reality, we and others have also found that compliance to policy mandates has varied. For example, schools where teachers work with low-income children, including English learners, are more likely to require teachers to strictly adhere to policy initiatives than those that serve middle and upper class children (Achinstein and Ogawa 2006; Cummins 2007; Dudley-Marling and Paugh 2005; Pease-Alvarez and Samway 2008). Further, in the study we report on here and in previous research we have conducted, we found that

teachers did not willingly implement policies; they did so because they felt coerced (Pease-Alvarez and Samway 2008).

The main purpose of this paper is to share insights into the specific ways teachers negotiated their roles in a contentious policy environment where top-down policies were required and teachers had few opportunities to resist formally. Our study aimed specifically to examine how teachers of ELs interpreted and implemented language education policies that introduced the OCR program. In so doing, we paid close attention to how the various contexts in which the teachers lived and worked influenced their understanding and implementation of the OCR program. Our aim was to provide insights into how the OCR mandate and related language education policies (e.g., use of English learners' primary languages) were experienced and interpreted by teachers in their own classrooms. In addressing this goal, we focus on language education policies that specify how educators should approach the teaching of language and literacy, which García and Menken (2010b) describe as "among the most dynamically performed" by teachers (p. 258). According to García and Menken, teachers actively negotiate policies in their classrooms, rather than directly implementing them as mandated by an authority figure or institution. When doing this, they engage in policymaking, and when engaging in this process, they draw on their experiences, understandings, philosophies, and aspects of the policies themselves. In so doing, they transform policies.

### **No Child Left Behind (NCLB) and the schooling of English learners**

As many scholars within the U.S. educational scene have argued, there are enormous variations in the kinds of learning experiences offered in U.S. schools to upper/middle and low-income students, including low-income English learners, with upper and middle income students having access to more rigorous and challenging instruction and learning experiences than low-income students (Suárez-Orozco et al. 2008; Oakes 1985; Swadener and Lubeck 1995). Researchers describing these differences have found that the schooling of low-income ELs is often characterized by an unrelenting focus on English skills at the expense of opportunities to learn challenging and interesting content and academic English and to more fully develop their native languages (Gutiérrez et al. 2002; 2000; Menken 2008; Orellana and Gutiérrez 2006; Valenzuela 1999; Valdés 2004). As research has shown, the native language is an invaluable resource to ELs in their academic learning (e.g., August and Shanahan 2006) and to deny them access to this resource undermines their opportunities to learn in school.

There is evidence that the current educational policy environment in the U.S. has exacerbated this pattern of differential, English skill-focused instruction for ELs (Cummins 2007; Gándara and Baca 2008; McCarthey 2008; Sunderman et al. 2005). This is particularly apparent in California, where state authorities have chosen to test all students in all subject areas in English regardless of students' English proficiency or academic history in the U.S. Gándara and Baca (2008) describe California as "willfully" ignoring the federal policy under NCLB, which recommends that English learners who have attended school in the U.S. for fewer

than three consecutive school years be tested in their native languages. As Gándara and Baca further argue, the English-only testing policy threatens the few remaining bilingual classrooms and programs that have managed to endure despite the passage of Proposition 227 in 1998, which stated that “all children in California public schools shall be taught English as rapidly and effectively as possible.”<sup>1</sup>

Not surprisingly given these programmatic decisions, EL students often do not meet the required benchmarks on reading tests administered in English. Consequently, ELs tend to be enrolled in federally mandated Program Improvement (PI) schools and districts, which, until recently, were likely to be required to participate in Reading First, the federal government initiative providing funding under NCLB to improve the reading performance of low-achieving students. Throughout the U.S., teachers working in schools receiving Reading First funding were required to implement prepackaged reading programs developed for native English speakers. These programs rely on standardized or one-size-fits-all approaches to instruction that do not acknowledge differences between the learning and teaching of reading in youngsters’ first and second languages (Harper et al. 2008). These programs also focus heavily on micro-level, sub-skill instruction (Duncan-Owens 2009). In addition, as Harper et al. (2008) point out, these programs do not take into consideration the specific learning needs of ELs and the related specialized pedagogical knowledge that teachers of ELs need in order to be successful. In addition to mandating the use of commercial reading programs throughout the elementary grades, many schools and districts in California insist that teachers adhere to pacing and testing schedules designed to enforce teachers’ implementation of these programs with fidelity (Pease-Alvarez and Samway 2008); this further undermines the ability of teachers to teach according to the needs of their EL students.

Two additional policies in California have contributed to the utilization of prepackaged programs in classrooms serving English learners and other low-income students: (1) the California State Board of Education mandated that districts could use state textbook funds to purchase only one of two reading/language arts programs in Grades K-6: *SRA Open Court Reading* (SRA/McGraw-Hill) or *Reading: A Legacy of Literacy* (Houghton-Mifflin), both of which were developed for native English speaking children; and (2) the California State Board of Education required schools receiving Reading First funds under NCLB to use one of these state-approved reading programs in grades K-3.

Research investigating the impact that these programs have had on ELs’ learning has yielded some troubling findings. For example, it has been found that *Open Court Reading* and *Reading: A Legacy of Literacy* have not contributed to the reading achievement of struggling readers, including ELs (Alvarez and Corn 2008; Gutiérrez et al. 2000; Moustafa and Land 2002; McGill-Franzen et al. 2006; Wilson et al.

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<sup>1</sup> Although bilingual education is close to being eradicated in California as a consequence of Proposition 227, the English-only requirement in the proposition can be waived if a parent or guardian indicates that an alternate course of educational study would benefit his/her child. This essentially means that if sufficient numbers of parents in a given school petition for instruction in the native language as well as English, bilingual education might potentially be offered. Because of this provision, a Spanish version of OCR, *Foro Abierto*, is used in some schools.

2004). Also, school-wide efforts to enforce such programs have been shown to result in pedagogical environments that jeopardize the literacy learning opportunities available to students, including those serving ELs in high poverty schools (Gerstl-Pepin and Woodside-Jiron 2005; Hassett 2008; Sunderman et al. 2005).

Now that NCLB is up for reauthorization by the U.S. Congress and Reading First funding has come to an end, there is speculation about policies that the federal government will develop to improve the literacy education of low-income students and ELs. New initiatives at the federal level are being proposed about how to meet the reading needs of these and other students, including the Learn Act designed to improve the reading and writing of K-12 students. Some have claimed that these new initiatives represent a continuation of the aforementioned policies aimed at requiring educators and schools to adopt and implement standardized reading curricula (Rich 2009; Zehr 2009). Such a move towards top-down enforcement of literacy and language programs, curricula, or approaches parallels language education policy shifts in other countries, such as Chile (Galdames and Gaete 2010), South Africa (Bloch et al. 2010), China (Zhang and Hu 2010), Mexico (Freeman 2010), England (Hall et al. 1999), and Norway (Hall et al. 1999). In some cases, this has entailed the required use of one-size-fits-all or standardized programming for all students regardless of their linguistic and cultural backgrounds and experiences (e.g., Davis, forthcoming). For example, Hall, Ozark and Valla describe England's move toward top-down standardized approaches to teaching and assessing literacy in the 1990s as being contextualized within a social and political milieu in which education in England was cast in a market mold.<sup>2</sup> Below, we examine the views and experiences of teachers of ELs in one region of California who have negotiated the policy environment in reading education and, through this, provide an important vantage point from which to understand the impact of these policies and the role teachers play in the policy-making process.

### Teachers as policy makers

Like an increasing number of scholars of language policy, Hornberger and Johnson (2007) argue that language education policies do not move directly from policy makers to the classroom. They comment, "negotiation at each institutional level creates the opportunity for reinterpretation and policy manipulation" (2007, p. 527). Over the course of the last several years, scholars and researchers have highlighted the role educators play in the language policymaking process. As García and Menken (2010a) state, teachers are as responsible for making policies as are bureaucrats, who are typically associated with policymaking, and they comment, "educators at the local level hold just as much responsibility for policymaking as do government officials" (pp. 3–4). Thus, as key participants in the policy-making

<sup>2</sup> Unlike England's policy documents that focused on literacy as a subject, Hall, Ozark and Valla describe Norway's literacy policy documents as emanating from a vision of human and child development grounded in values of democracy and community that reflected the interests of professional educators. Interestingly, when comparing policy documents in both contexts, the authors underscore how these documents "are politically powerful media of socialization and cultural reproduction" (p. 101).

process, teachers and other school personnel, such as school administrators and literacy coaches, are not mere conduits of curricular policies. Instead, teachers are fundamental to the language education policymaking process as they “interpret and modify received policies” (Evans and Hornberger 2005, p. 99).

As Menken and García (2010a) point out, similar perspectives undergird the work of scholars studying teachers’ responses to top-down curricular policy initiatives, which include those studying education policy from a language policy framework. Instead of describing teachers’ responses to education policy as either enacting or obstructing a mandate, these researchers conceive of teachers engaged in a process of making meaning of policy initiatives as they engage with others in the various facets of their personal and professional lives (e.g., Coburn 2001, 2004; Datnow and Castellano 2000; Datnow et al. 2002; Hargreaves 2003, 2005). From this vantage point, teachers engage in purposeful and generative activity as they make sense of policy initiatives, and they do so in ways that draw on, reflect, and contribute to their identities, relationships, and understandings (e.g., Gitlin and Margonis 1995; Hargreaves 2003).

Instead of conceiving of teachers’ opposition to or compliance with top-down mandates as an unwillingness to change or blind submission respectively, researchers are finding that teachers’ interpretations and implementation of these initiatives may emanate from teachers’ professional convictions about what it means to be a teacher as well as deeply-held principles about learning and teaching (e.g., Achinstein and Ogawa 2006; Bloch et al. 2010; Datnow and Castellano 2000; Galdames and Gaete 2010; Joseph 2006; MacGillivray et al. 2004; Pease-Alvarez and Samway 2008; Zhang and Hu 2010). For example, Hélot (2010) reports on how student teachers in France implemented policies that promoted monolingual French instruction for nonnative French speaking students. She comments that the student teachers resisted these policies by engaging in practices that acknowledged the interests, needs, and linguistic backgrounds of their students in ways that, for example, promoted multilingualism.

Furthermore, when negotiating power relations in top-down policy environments like the one currently in place in the U.S. and elsewhere, teachers have been described as asserting their agency in creative and strategic ways. This has taken the form of teachers appropriating reforms in ways that enable them to continue their pedagogical practice (Galdames and Gaete 2010; Woods 1994); engaging in the covert use of banned instructional practices (Pease-Alvarez and Samway 2008); and/or tweaking or accommodating the required program with or without the approval/encouragement of administrators (Galdames and Gaete 2010; Pease-Alvarez and Samway 2008). In addition, as Handsfield et al. (2009) found, teachers may simultaneously reproduce dominant state-sanctioned literacy practices and engage in “clandestine operations” that disrupt those practices. From Zakharia’s (2010) perspective, teachers who rearticulate top-down language education policies may be viewed as agents involved in what she refers to as the reformulation or reconstruction of those policies. This article examines the role a group of U.S. teachers of English learners played in the process of reformulating policies that required them to use a one-size fits all program for the teaching of literacy.

## Research design and data sources

We interviewed 32 teachers who worked in four elementary schools in two urban districts in the San Francisco Bay Area (two schools in each district).<sup>3</sup> Each of the four schools served about 400 students; at least 90% of all students in each school were ELs of Latino descent. In selecting the schools, we used data posted online by the two school districts to identify schools from each district with similar annual yearly progress (AYP) designations and student demographics (e.g., schools in predominantly low-income neighborhoods and with large numbers of ELs).<sup>4</sup>

The Webster Unified School District (Webster USD) served just over 48,000 students, while the Montoya Union School District (Montoya USD) served about 13,500 students. Both districts were named Program Improvement (PI) districts the year of our study, which means that the districts had not met testing targets required under NCLB for two consecutive years. In both districts, elementary school teachers were required to use OCR or, in the case of five teachers working in bilingual primary grade classrooms (i.e., grades K-2) in the Webster USD, its Spanish equivalent, *Foro Abierto*; because the district failed to purchase the Spanish version of the program in grades three through five, students enrolled in bilingual classes in those grades had access to only the English version of OCR. District personnel enforced the OCR mandate via periodic monitoring of teachers' classrooms and practices. In addition, teachers were required to (1) adhere to district pacing guides that specified on a daily basis when various components of the program were to be taught, and (2) administer a test every 6 weeks that was purported to assess students' knowledge of phonics, phonemic awareness, reading fluency, vocabulary, reading comprehension, and writing.

We randomly selected seven to nine teachers from each of the four schools. Our sample included 13 primary grade teachers and 19 intermediate grade teachers, and they shared characteristics of many elementary grade teachers in our state. For example, most of the teachers (75%) were female and most (69%) were of European American background. Teachers in the Webster USD had taught an average of 14 years, while teachers in the Montoya USD had taught an average of 7 years.

The authors of this paper and a research assistant interviewed each teacher using a semi-structured format; the interview questions were designed to capture teachers' perspectives on OCR and how the districts' policies around the program had affected the teachers' beliefs, instructional practices, and working relationships. During these interviews, which were audio-taped and lasted from 1½ to 2½ hours, we collected information about decisions the teachers had made around program

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<sup>3</sup> In order to maintain the anonymity of those participating in the study, we use pseudonyms when referring to teachers, principals, districts, and schools.

<sup>4</sup> Under NCLB, states were required to develop benchmarks to assess student progress; to "raise the bar" gradually so that, by the end of the 2013–2014 academic year, all students would achieve proficiency in reading, math and science; and to disaggregate student achievement data by subgroups, such as race, socioeconomic status, and English learners. AYP (adequate yearly progress) measures student achievement on state assessments in reading and mathematics. If a school or school district does not meet their state's definition of AYP for two straight years, it is considered to be "in need of improvement."

implementation, their views about learning and teaching; their backgrounds (e.g., their professional experiences and years teaching); their perspectives on their students; the school and district cultures in which they worked; and how this information contributed to their views of OCR. (See “Appendix” for a list of the core questions.) We also interviewed the teachers’ principals using a similar set of questions, as well as questions intended to elicit information about their enforcement of the OCR mandate. Like the teacher interviews, principal interviews were tape recorded and transcribed.

When analyzing the interviews, we used an inductive, iterative approach outlined by Tesch (1990) and Creswell (1994). This involved research team members reading and discussing interviews, creating conceptual memos to note trends in data, and annotating and coding data based on these trends. In addition to developing codes that captured teachers’ opinions of Open Court, their views on the mandate requiring they use it, and their level of program implementation, we developed codes that tapped into different dimensions of teachers’ experiences, perspectives, and contexts that they stated influenced their views on and implementation of the program. We began by using the following overarching categories to code these influences: teachers’ assumptions about teaching/learning and knowledge about language and literacy, teachers’ education or professional development, teachers’ classroom experiences, teachers’ life experiences, and teachers’ positions and relationships in the workplace. Then, after repeated readings and conversations regarding these different categories, we generated subcategories that captured further distinctions; we subsequently used these subcategories to analyze each of the interviews. Two members of the research team independently coded each interview and we discussed any coding discrepancies in order to resolve them.

## Findings

Overall, our findings revealed that teachers tended to have negative views about OCR and the mandate requiring that they implement it. At the same time, there was variation in teachers’ implementation of the program, with some creatively challenging the mandate within the confines of an authoritarian workplace environment. Most teachers (63%) viewed the OCR program in negative terms, and the majority of these teachers (90%) grounded their critiques in situated views of learning and teaching.<sup>5</sup> That is, they thought that some aspect or aspects of the program did not relate to the needs, interests, and/or understandings of their students. For example, teachers commented that the over-reliance on skills instruction was boring to students; the tendency for large group instruction did not meet students’ specific needs; and the reading materials were much too difficult

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<sup>5</sup> When examining discrepancies among teachers’ views of the curriculum, we found some differences in the views of novice and more experienced teachers. Interestingly, 83% of teachers who had taught for no more than 5 years (i.e. 10 out of 12 teachers) had predominantly negative views of the OCR curriculum, while teachers who had taught for over 20 years were evenly divided in their opinions of the curriculum, with 50% (three teachers) holding predominantly positive views of the OCR curriculum and 50% holding predominantly negative views of the curriculum.



for their students (e.g., many students could not independently read the texts, and the reading selections addressed topics that were unfamiliar to or of little interest to students). The following comment from Olga, in which she explained why she did not think OCR should be used with all students, particularly ELs, captures what so many teachers told us in the interviews:

You know, kids develop at such different paces and it doesn't make sense. It's [OCR] just too rigid and it doesn't take into account where students are at... they need to read text at an appropriate level. They need time to learn things, so you [the teacher] need to be able to focus on *What am I really teaching*, instead of having ten million things that you're supposed to teach in a week. Because kids just don't retain information that well. And then, it needs to come out of them and their experiences and their academic levels. And not be a top down kind of thing.

In addition, five teachers working in the Webster USD pointed to the problems inherent in being required to utilize an English-medium program with Spanish-speaking students who had little prior experience with reading in English. Also, four of the five teachers who were using the Spanish version highlighted inaccuracies in the Spanish translation of the program.

Many of the teachers (88%) commented that they were dissatisfied with some aspect of their professional lives as a consequence of their districts' decision to mandate OCR, with many reporting deep frustration with the fact that they had lost control over what and how they taught. Seventy-eight percent of the teachers told us that they disapproved of the mandate because they thought that they should be responsible for deciding whether or not they utilized OCR or any of its components. This was true of both experienced and relatively new teachers. For example, Amy was in her second year as a teacher when she reflected upon how she felt constrained by the OCR curriculum and wondered how she would have been as a teacher if she had not had to adhere to a highly prescriptive program. She said the following when commenting on how she had taught on the day of the interview:

I feel like the stuff I did today was not that multi-modality... there are a lot more learning style ways to do it. But, I don't feel like I'm supposed to be doing things in such a different way, which is unfortunate... I feel like I could do a lot more than I'm doing, which is frustrating, also, as a new teacher. This is the way I'm developing. And, I mean, I've still been developing, but I wonder what it would be like to be learning how to teach in a setting that wasn't so prescribed.

Many teachers commented that curricula like OCR should be a resource for them to draw upon when making decisions about how to teach students and how to best meet students' varying academic needs. Even teachers who held positive opinions of OCR shared this view.

In addition to teachers' overall assessment of the program and the mandate requiring them to use it, four additional themes emerged from our analysis of the interview data that elucidate how professional agency and structure (e.g., societal and institutional influences that can support or constrain human activities) were

implicated in how teachers negotiated their implementation of the OCR mandate: (1) teachers made principled adaptations to the program; (2) people overseeing teachers' implementation of OCR influenced teachers' actions; (3) administrators differentiated enforcement of the OCR mandate; and (4) supportive principals and colleagues affected teachers' actions. We describe these findings in greater depth below.

### Teachers' principled adaptations to the program

Despite their concerns about working in an authoritarian environment that obligated them to use a program with which they had serious reservations, all but one of the teachers used OCR; however, they commented that they made adjustments to the program in order to better meet the needs and interests of their students. These adjustments included implementing a variety of schema-building and small group activities intended to make the English-medium program accessible to ELs; jettisoning activities that they thought were too hard or too boring for students or were poorly conceived; taking more time on a unit or with an instructional point that students found difficult; replacing or supplementing the writing portion of the program with another approach to teaching writing; and, in a few cases, using Spanish to explain the English text and vocabulary. To illustrate, when justifying the accommodations she made to the program, which included replacing the Open Court writing activities and adding guided reading, Lucy, like many other teachers, spoke of the inadequacies of a one-size fits all curriculum. She noted, "students don't fit into a one-size-fits-all anything anywhere, and there need to be adjustments made for their individual needs, especially English language learners." Several teachers who were critical of the battery of assessments that they were required to implement as part of the Open Court mandate told us that they used additional forms of assessment that they considered to be more revelatory of their English learners' strengths and needs, as well as more useful when it came to planning for instruction. For example, as the following interview excerpt illustrates, Ellen made accommodations to the program that included returning to the use of the DRA (Direct Reading Assessment) and running records (Clay 1993) to identify her students' needs as readers:

The [Open Court] assessments do not inform my practice. It's very difficult for me to know exactly what to give specific students without doing extra assessments. So I personally still do DRA reading assessments, or at least running records. Last year I managed to do it with all of my kids. I don't know if I can do that this year; it takes a lot of time and when it's not built into the structure of the school, it's almost impossible. And for it to be useful, you want to do what we used to do, three times a year. We did it at the beginning, we did it in the middle of the year and changed our groups, and then we did it again at the year end. And of course you do it whenever a kid comes in or somebody's made a great jump and you want to kinda check in on them. It's how you know where your kids are. The Open Court assessments don't give me that kind of information.

Several teachers also referred to their beliefs about how reading should be taught when justifying an adjustment to or accommodation they made to OCR. For example, ten teachers (31%) talked about how children could not learn to read if teachers strictly followed the OCR program, as the program is grounded in whole class instruction, using the same texts with all students, and teaching the same skills and strategies, regardless of students' development and needs. These teachers commented that children learn to read when given texts that they are able to read independently, with support from a teacher, when necessary. Six of these teachers, all of whom taught at Burgess School, told us that this led them to supplement the program with a small group approach to teaching reading, guided reading,<sup>6</sup> so that children could be appropriately supported when reading books at their instructional level. Interestingly, guided reading had been an approach to reading instruction that most of the Burgess teachers had used prior to the OCR mandate. Similarly, a view that recognizes that reading is primarily an issue of comprehension rather than simply decoding appeared to explain some teachers' decisions to put more emphasis on the reading strategy components of the program; these teachers skipped lessons focused on phonics rules that they thought their students already understood, or spent more time than specified in OCR on reading strategy/reading comprehension activities that supported their students' understanding of the text.

#### Influence of overseers on teachers' actions

While most teachers had predominantly negative opinions of the Open Court program and an even greater number disapproved of their districts' decisions to mandate OCR, all but one of the teachers stated that they were complying with district and school-wide policies by using the program. When explaining why they complied with these policies, these teachers commented that individuals or entities required that they implement the program; over one third of the teachers said that to do otherwise placed them in jeopardy of losing their jobs. Teachers referenced their principals, district administrators, or district office staff, such as instructional facilitators, when describing the authority figures responsible for making sure that they implemented the program. Several shared accounts of occasions when they had been sanctioned for not utilizing the program as designated in the teachers' manual or in the pacing guide, and they had been reprimanded by administrators, "written up," and/or involuntarily transferred to another school within their district.

#### Administrators differentiated enforcement of the OCR mandate

Despite the districts' attempts to have all teachers at a given grade level implement the OCR program exactly as written, this did not happen. Principals were those most immediately tasked with program implementation, but they were not always

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<sup>6</sup> Guided reading (e.g., Fountas and Pinnell 1996) is a small group approach to teaching reading that focuses on teaching and reinforcing reading skills and strategies as children are reading. It includes continuously assessing students' reading processes, strengths, and needs through observing children in the act of reading; flexibly grouping students for instruction; focusing on reading for meaning; and using books written at the child's instructional reading level.

consistent in how and to what degree they enforced program “fidelity.” None of the principals in the study was opposed to the OCR program; however, they varied in their expectations of and actions towards teachers in their schools, and principals acknowledged this reality. For example, four teachers from three of the schools commented that their principals supported their decisions to adjust the program, and differentiated the degree to which they enforced the district mandate. These teachers reported that their principals did not always intervene when they used a practice that their colleagues were not allowed to use because they taught in ways that the principals admired. This is captured in a comment Olga made when explaining why her principal ignored the adjustments she was making to OCR: “The principal has known all year what I do and because she wants me to stay and thinks I’m a good teacher, she cuts me slack.” Erin, the only teacher in our study who told us that she had refused to implement the program, said that her principal allowed her to assume a position in which she was not required to use the OCR program because her principal admired Erin as a teacher and feared that she would resign if required to use the OCR program.

The interviews with teachers revealed further evidence that principals differentiated the degree to which they enforced teachers’ compliance with the mandate. For example, teachers in one school reported having very different relationships with the principal, such as the principal insisting on full compliance with the program in the case of one teacher and flexible compliance in the case of another teacher. This is illustrated in the cases of Anna and Diego, who taught at the same school, had similar years of teaching (27 and 30 years, respectively), and both strongly disliked OCR. They also both valued student-centered instruction that allowed them to build on the needs and understandings of students. However, they implemented OCR in very different ways. Diego made only minor adjustments to the program, such as “trimming” a few activities, whereas Anna made more substantive adjustments, which included supplementing the program with additional opportunities for students to read and write and the utilization of a process approach to the teaching of writing. When explaining their actions, the teachers referred to very different relationships with their principal. Diego was new to the school and had no previous contact with the principal, and by October of his first year at the school, the principal had written him up twice for not following OCR “to the letter.” According to Diego, the principal’s surveillance and monitoring of his teaching compelled him to follow OCR very closely; he engaged in self-monitoring to avoid getting written up again (and possibly being involuntarily transferred to another school), and made only very minor adjustments to the program, despite his concerns about it. In contrast, Anna reported making fairly substantial adjustments to OCR, which she felt she could do because of her longstanding relationship with the principal and her confidence that the principal would approve of the way she was using the program.

In an interview with Anna and Diego’s principal, Alejandra, she commented that, although OCR did not meet the needs of all students, particularly newcomers to English, she thought that it was a good program because it addressed important reading skills and strategies and did so in an organized way; she said “I think that I could say with a lot of confidence... there is consistency and it seems to really focus on a lot of target areas in terms of literacy.” However, she also said that she

would prefer it if schools had more flexibility in the pacing of instruction and in the texts that children read (i.e., she would prefer it if teachers could use more children's literature, rather than being limited to the textbook). When asked what she would expect to see when observing good teaching of reading, she first identified classroom management and commented that, even if teachers were very knowledgeable about OCR, but couldn't manage their students, they would not be successful teachers. Then, as the following interview excerpt illustrates, she listed characteristics of teaching that are not related to OCR, such as student engagement and routines being in place:

What I'm looking for first of all is, are the students engaged? Are they responding to what the teacher's teaching? So if you see a class where the students are just, you know, just excited or just really understanding, then I know that there was some good pre-teaching going on; that she was able to go into building knowledge, if there was not enough knowledge, or looking at what kids, experiences they had and what they brought into the classroom. So, I mean, I'm looking at...students really responding, writing away or really listening, you know. And raising their hands and being able to express themselves and kind of even develop their own ideas, so that's what I'm looking at in terms of classroom. So just a totally engaged population of students responding to what's being taught and also if they know the routines. It's like the little wheels in their head are just spinning; that's what I look at.

Interestingly, Alejandra added that these characteristics would be more likely to be encountered in the "workshop" time of OCR instruction, when teachers worked with individual students or small groups of students, which most teachers in our study found hard to make time for as the program was often too difficult for their students. Later in the interview, Alejandra also commented that success could be seen in increased test scores and, if test scores didn't improve, teachers were not being successful; this claim, of course, is complicated by the realities of classrooms that have newcomers to English. She asserted that she believed that the program needed to be implemented fully in order to be successful and all teachers should implement OCR as it was a district mandate, a reality that appeared to influence her actions as a principal, at least with some teachers. In some respects, Alejandra's comments suggested a somewhat contradictory regard for the OCR program (e.g., it should be fully implemented, but schools should have flexibility); however, it was clear that she felt enormous pressure to raise test scores and publicly support the full implementation of the program. This may have been related to the vulnerability of principals as they were the first to be removed from their positions in Webster USD if schools were considered to be underperforming or in trouble.

### Supportive principals and colleagues influenced teachers' actions

Half of the teachers told us that at some time or other their principals or other school-based personnel (e.g., literacy coaches) directly or indirectly supported their efforts to make adjustments to the program and/or approved of the adjustments that

they were making; principals also acknowledged that this occurred. This was particularly evident in the case of teachers working at the two schools in the Montoya USD. Both principals were new, as were the literacy coaches. Teachers working at these two schools described their former principals as strict enforcers of the district-wide policy requiring teachers to use OCR, whereas they viewed their new principals and literacy coaches as much less authoritarian. Teachers offered a variety of reasons for the more flexible enforcement under the new administrators, but many teachers attributed it to their principals' and literacy coaches' more informed views about teaching and learning, including the role teachers should play in instructional decision-making and the role administrators should play in supporting teachers' work. Both of these principals confirmed these teachers' views when they told us that they were more flexible in their enforcement of the mandate than their predecessors.

Teachers also described how their relationships with colleagues at their school sites influenced the degree to which they implemented OCR. In the case of the primary grade level team at Burgess school, which was comprised of several veteran teachers who had worked at the school for ten or more years, teachers talked about how they supported one another in figuring out how to effectively implement the program. In addition, teachers talked about teacher leaders at their schools who appeared to have an impact on program implementation. For example, some teachers at Burgess School commented on the influence of veteran teachers with experience using OCR who had been involuntarily transferred to their school; Amy, a second year teacher, was particularly appreciative of the support these teachers provided, including demonstrations in her classroom (e.g., modeling word knowledge and fluency practice).

## **Discussion and implications for language education policy**

Our study reveals a picture of policy implementation that is affected by an intermingling of top-down influences and teacher agency. It also helps elucidate the theme of "working within the system" that has been prevalent in scholarship focused on describing teachers' relationships with authority (Ingersoll 2003; Tyack 1974). As this article has demonstrated, although many teachers had concerns about the OCR program, only one teacher refused to use it. Instead, drawing on their pedagogical commitments to teaching according to the academic needs of their students, teachers made adjustments to the program and, in so doing, accommodated institutional authority. Because half of the teachers commented that someone on their school staff, usually their principal, supported or knew about their efforts to adjust the program, we are left with a complex and nuanced view about how institutional authority was implicated in the way some teachers implemented the OCR mandate. Rather than strictly enforcing the mandate, principals and other authority figures (e.g., literacy coaches) sometimes mediated teachers' efforts to adjust the program or ignored the adjustments of those who they thought were good teachers. Even the one teacher who told us she refused to use the OCR program said she was able to do so because her principal allowed her to assume a teaching position that did not obligate her to use the program.

Our findings have important implications for the education of ELs. Research suggests that low-income students, many of whom are ELs, tend to be enrolled in schools where programs such as OCR and standardized approaches are likely to be utilized (e.g., Cummins 2007); one of the limitations of such mandates is that the program, rather than the needs of students, is the focus of instruction. Of course, when this happens, all students are vulnerable to receiving inappropriate literacy instruction, not just ELs (Moustafa and Land 2002). The majority of teachers whom we interviewed had serious reservations about the use of this kind of one-size-fits-all program with their EL students. Although they made adjustments to the program, they did so while working within the system, and found themselves engaging in instructional practices that they did not think adequately addressed their students' academic needs or reflected their students' experiences. This finding underscores how policies and the processes and conditions that shape teachers' implementation of these policies may contribute to perpetuating a system that ultimately limits ELs' opportunities to learn in school. Even the one teacher who refused to implement OCR did so by obtaining a position where she was not required to use it. If she had not obtained this position and had refused to use OCR, she would have been directly defying the mandate and perhaps creating a space for more open and overt resistance. What is unclear is how her principal would have responded, if she had pursued this course of action.

When considering the implications of this research for language education policy, it is clear that there is a need for policies that reflect an understanding of ELs' language and literacy development and how to effectively teach them. As Harper et al. (2008) argue, homogenous instructional policies that are driven by high stakes tests that result in instructional practices developed for monolingual, native English speakers do not address the language and literacy needs of ELs. Furthermore, our findings, which coincide with the views of others (e.g., Smagorinsky 2009), suggest that the institutional authority upholding this standardized approach to instruction has eroded the agency of teachers committed to responsive teaching aligned with students' experiences, needs, and understandings. When considering the role teachers play as language education policy makers, this means, for example, that teachers are often constrained from implementing practices that acknowledge the linguistic and cultural resources and language learning needs of bilingual and second language learners from non-dominant populations.

Instruction must be grounded in pedagogical principles informed by research on bilingualism and second language acquisition and take into account the professional knowledge and agency of teachers who have expertise in working with ELs (e.g., Harper et al. 2008). In addition, it is important to also take additional issues into consideration, including teachers (and administrators) having access to effective ongoing staff development and opportunities to engage in collaborative inquiry.

Effective, ongoing staff development

Investing in education for ELs that is grounded in pedagogical principles, rather than standardized curricula, emanates from a view of teaching as political, intellectual, and rigorous work (Pérez Abril 2005). Such a perspective is promoted

via policies at the federal, state and local level that focus on the ongoing professional development of teachers (and administrators) that enhance their ability to meet the needs of ELs. Unfortunately, the majority of teachers in our study (69%) commented that they had access to very few in-service professional development opportunities that supported them in their work with ELs. They were very critical of the OCR trainings that they were required to attend as they did not address their needs as teachers and did not accommodate teacher input or discussion. Many teachers advocated for sustained and situated approaches to professional development that addressed the needs and circumstances of their ELs. This finding is reminiscent of what Gándara et al. (2005) found in their study of nearly 5,300 teachers, in which the majority reported that they had not had access to adequate professional development focused on meeting the needs of their EL students.

### Collaborative inquiry

In addition to endorsing policies focused on teachers' ongoing professional development, we believe that teachers of ELs should play a generative role in the policy-making process in ways that enable them to draw on their pedagogical understandings and first-hand experiences with ELs as they dialogue with other educational stakeholders. An important aspect of this dialogue would include teachers working with others (e.g., researchers and teacher educators) to investigate how curricular policies are affecting their students' opportunities to learn in classrooms (Willett and Rosenberger 2005; Willett et al. 2008). For example, in their description of an M.A. degree for teachers that involves them in research on their classroom practices with professors, district administrators, other teachers, and parents, Willett et al. (2008) describe a collaborative that enabled teachers to transform standardized practices emanating from curricular mandates. Interestingly, in this case, a professional development initiative provided an institutionally-approved venue through which the collaborative negotiation and renegotiation of program and policy occurred. Moreover, an important aspect of this work was the generation of important knowledge about teaching and learning that informed teachers' classroom practices.

We have participated in other collaborative efforts to influence policy. For example, we have worked with a group of teachers known as Educators Advocating for Students (EAS) that has successfully advocated for teachers' voices in setting district policies (Pease-Alvarez and Thompson, in press). EAS first emerged as an opportunity for teachers of ELs to get together on a regular basis to share professional concerns about and experiences with standardized approaches to instruction and assessment that were mandated by their local district. Over time, EAS, which became a subcommittee of the local teachers' union, engaged in a variety of activities, including (1) writing letters to local newspapers describing their concerns about state and district mandated testing and assessment policies, (2) appearing on local community television programs describing these concerns, and (3) participating in collective bargaining efforts that led to including a clause in their contract requiring the district to seek teacher input on testing and assessment policies. Like the teachers described in this paper, members of EAS were compelled



by a set of pedagogical principles, including a commitment to balanced education (i.e., teaching science, social studies, art, and music, in addition to reading and mathematics), a reduction in time and resources spent on standardized testing, a focus on students' biliteracy development, and a view of teachers as active and vital participants in instructional decision-making.

## Conclusion

Teachers have been portrayed as pawns of the state when it comes to implementing policy initiatives, including the texts and curricular approaches that they are required to utilize in their classrooms. However, Apple (1988) provides a more nuanced perspective on this topic when he argues that while status quo power relations explain how these policy initiatives originate, teachers' actions can affect the implementation of these policies and even disrupt their hegemonic function. When describing the power behind these initiatives, he states, "this power is highly mediated and altered by the self-formative actions of teachers" (p. 185). As we have discussed in this article, understanding how teachers, along with colleagues and other educators, mediate power has been the subject of recent scholarship among researchers of educational policy, including the growing body of work on language education policy. Like other researchers (e.g., Achinstein and Ogawa 2006), we found that teachers of ELs were not passive implementers of a curricular mandate requiring them to implement the OCR program. Instead, the majority of teachers were actively engaged in the policy-making process through making principled adjustments to the program, often with the support or at least tacit approval of their principals. Nevertheless, many teachers found themselves teaching in ways that they did not feel met the needs of their EL students.

Although teachers made adjustments to the OCR program, they nevertheless were working in an often stressful, high stakes, professional context in which they felt very vulnerable—the possibility of being chastised publicly, written up, transferred involuntarily, or even fired was clearly on the minds of many of the teachers as they described their professional roles and situations, and they felt threatened. That context made it extremely difficult for teachers to mitigate the constraints of a one-size-fits-all program when teaching English learners, which we find troubling.

We are also concerned that such a context led to the implementation of inappropriate standardized approaches to teaching English learners by constraining teachers' opportunities to learn how to more effectively address the specific needs of their EL students. Thus, in addition to supporting the enactment of state, federal, and local policies that enable teachers of ELs to provide quality instruction that addresses the needs, interests, and understandings of their students, we are also advocates for policies and practices that promote the development of reflective, inquiring, and knowledgeable teachers who play a key role in the language policy-making process. In their discussion of what they deem to be key principles that enable teachers to assume this role, García and Menken (2010a) underscore the need for teachers to "turn inward" and consider the understandings and ideologies that influence their work as language policy makers. Teachers also need access to

professional development venues and workplace environments where they can work in collaboration with colleagues, students, parents, and other educational stakeholders as they enact and construct policies responsive to the needs and interests of English learners.

In many countries, there has been increased pressure to implement standardized curricula and programs and high stakes tests, resulting in a de facto language policy that upholds the status of national languages and standardized approaches to instruction that render the linguistic and cultural resources and academic needs of language minority students invisible, if not expendable. In this article, we have discussed the role that teachers and other educators play in the policy-making process in the context of two U.S. urban school districts serving children who have been designated as English language learners. Requiring these students to learn literacy via the use of a one-size-fits-all program like OCR disregards their varying linguistic, cultural, and academic resources and needs. While we have shown that teachers and other educators play an important role in negotiating these policies, we have also shown that they are constrained by a number of forces, conditions, and circumstances that affect their agency as policy makers. Given that the role teachers play in the language education policy-making process is situated and dynamic, continued research in a variety of international contexts should provide important insights into the ways that human agency is implicated in this process.

**Acknowledgments** This research was supported in part by a grant from the University of California Language Minority Research Institute (LMRI). We would like to thank Kendall King, an editor of *Language Policy*, and the anonymous reviewers for their feedback and suggestions.

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## Appendix

### Core interview questions

1. What do you think of the Open Court program?
2. Has the Open Court program met your English learners' reading/writing needs? How/in what ways?
3. What do you think are the strengths of the Open Court program when used with English learners?
4. What do you think are the weaknesses of the Open Court program when used with English learners?
5. What do you think of the policy in your district requiring that you implement the Open Court program?
6. Are you implementing the Open Court program in your classroom? If so, why?
7. Do you think you are making adjustments to the Open Court program? If so, what kind of adjustments are you making? Why are you making those adjustments?

8. Has anyone helped or enabled you to make adjustments to the Open Court program? How have they helped you?
9. Do administrators approve of the way you are using/not using the Open Court program? How do you know? Why do you think that your administrator approves of/doesn't approve of the way that you are using/not using the program?
10. Do you agree with the policy that all teachers in your school should use the Open Court program? Why/why not?

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**Carrie Cifka-Herrera** is currently a PhD candidate at the University of California, Santa Cruz in the specialization areas of language, literacy, and culture and teacher development. Her research interests include language and literacy policies related to English Language Learners, school reform, and urban teacher development. Before entering the doctoral program, she taught elementary school students in San José and East Palo Alto.