Navigating the Gap between Scripted Writing Curricula
and Teacher Efficacy:
A Narrative Inquiry into Teachers’ Implementation
of Scripted Materials in Their Classrooms

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Abstract

Since the No Child Left Behind Act of 2001 linked federal monies to student performance on standardized tests, schools have faced increased pressure to provide high quality writing instruction. As district administrators search for curricula to support that instruction, they increasingly turn to scripted curricula. Scripted curricula is designed to spell out what the teacher should do, and in some cases, precisely what the teacher should say. Self-efficacy theory and its applications to teacher self-efficacy guided this interpretative phenomenological analysis of the lived experiences of six teachers as they navigated the district-mandated implementation of the Lucy Calkins Units of Study writing curriculum. Detailed analysis of participants’ interviews revealed four interrelated findings: the manner in which the district communicated regarding the new curriculum negatively affected teachers’ implementation, the Units of Study curriculum required a philosophical shift for some teachers, teachers felt most effective when they used their own toolbox to purposefully combine methods based on their understandings of students’ needs, and teachers felt that training and purposeful collaboration were necessary when implementing new curricula. The data supported existing literature stating that self-efficacy can predict the likelihood that teachers will implement new projects successfully and that teachers are most successful in meeting students’ needs when they use their own professional judgment to select a variety of materials. These findings are relevant to district administrators as they consider adoption of new curricula and ways to communicate with and support teachers during implementation.

Key Words: self-efficacy, teacher efficacy, scripted curriculum, writing instruction, Units of Study, Lucy Calkins
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Table of Contents

Abstract ........................................................................................................................................... 2

Acknowledgements ......................................................................................................................... 3

**Chapter 1: Introduction** .............................................................................................................. 7
  Statement of the Problem ............................................................................................................. 7
  Positionality Statement .................................................................................................................. 9
  Research Question ....................................................................................................................... 11
  Theoretical Framework .................................................................................................................. 11
    Self-efficacy ............................................................................................................................... 11
    Teacher self-efficacy ................................................................................................................... 12
    Rationale for framework ............................................................................................................ 14

**Chapter 2: Review of Literature** .................................................................................................. 15
  Teacher Self-efficacy ................................................................................................................... 15
    Formation of teacher self-efficacy ............................................................................................ 15
    Measurement of teacher self-efficacy ......................................................................................... 19
    Relevance of teacher self-efficacy to current study .................................................................. 22
  Educational Power Structures and Curricular Adoption ........................................................... 22
    Legislation and the standardization movement in education ................................................. 23
    The impact of organizational structure on change ................................................................. 26
    Types of curricular change: Materials versus methodology ................................................. 28
    Relevance of educational power structures and curricular adoption to current study .......... 30
  Teaching Writing ......................................................................................................................... 31
    Skill-based versus process-based orientations ....................................................................... 31
    Writing workshop approach .................................................................................................... 32
    Scripted curriculum .................................................................................................................... 33
    Lucy Calkins Units of Study curriculum .................................................................................. 36
  Conclusion ...................................................................................................................................... 36

**Chapter 3: Methodology** ............................................................................................................. 38
  Research Design ............................................................................................................................ 38
  Research Tradition ....................................................................................................................... 39
    Phenomenology .......................................................................................................................... 40
    Hermeneutics .............................................................................................................................. 40
  Participants and Access ............................................................................................................... 41
  Data Collection and Analysis ...................................................................................................... 43
  Trustworthiness and Verification ................................................................................................. 45
  Data Storage ................................................................................................................................ 47
  Protection of Human Subjects ..................................................................................................... 47
  Summary ....................................................................................................................................... 49

**Chapter 4: Data Analysis** ............................................................................................................ 50
  Situational Context with Regard to Curricular Adoptions ....................................................... 50
Chapter 5: Findings and Discussion

Revisiting the Problem of Practice ................................................. 107
Revisiting Methodology ............................................................... 107
Interpretation of Key Findings ...................................................... 108
  Finding 1 .............................................................................. 109
  Finding 2 .............................................................................. 112
  Finding 3 .............................................................................. 114
  Finding 4 .............................................................................. 116
Discussion of the Findings in Relation to the Theoretical Framework .............................................................................. 118
  Task efficacy ........................................................................ 118
  Interpersonal efficacy .............................................................. 119
Discussion of the Findings in Relation to Current Literature .............................................................................................. 121
  Writing instruction ................................................................ 121
  Teacher self-efficacy ............................................................... 125
  Educational power structures and curricular adoption ................. 127
Implications for Practice ............................................................... 130
Implications for Future Research ................................................ 133
Limitations of the Current Study .................................................. 133
Conclusion .................................................................................. 134

References .................................................................................. 136

Appendix A: Recruitment Letter .................................................... 149
Appendix B: Informed Consent ....................................................... 150
Appendix C: Interview Protocol ...................................................... 155
Appendix D: NIH Certificate .......................................................... 159
List of Tables

Table 1: Participant Background Information ..........................................................................

Table 2: Themes Related to the Research Question .................................................................

Table 3: Key Findings ...........................................................................................................
Chapter 1: Introduction

The purpose of this interpretative phenomenological analysis was to investigate the individual experiences of elementary writing teachers as they implemented a scripted curriculum that had been adopted district-wide. Knowledge generated from this study may be used to inform administrators about possible approaches to introducing curricula to teachers and to provide suggestions for teachers on how to navigate the differences between their own pedagogical beliefs and the methods employed by adopted programs.

This chapter provides an overview of the context and background surrounding this problem of practice, discusses the rationale and significance of the problem, explores issues of positionality, and defines the purpose of the study and the specific research question. This chapter concludes with a discussion of self-efficacy theory, which served as the theoretical lens through which the implementation of scripted writing curricula was examined.

Statement of the Problem

Last fall, the researcher received a panicked phone call from a local teacher whom she considered one of the best writing teachers in the area. “School starts in a week,” she said, “and I was just handed a whole new writing curriculum. I don’t know where to start.” This teacher’s district had adopted the Lucy Calkins Units of Study (UOS) writing curriculum for all of its elementary schools. Later in the year the teacher shared that, despite initial teacher buy-in and evidence that the pedagogy used in the Calkins approach is rooted in best practices, many teachers at her school struggled with implementing the program in their classrooms. The idea that skilled teachers could have such difficulty implementing a curriculum raised questions about the nature of curricular decision making and teacher efficacy.
Although reform efforts in education are nothing new, the combination of emphasis on high-stakes standardized testing, state accountability models that assign schools A-F letter grades based on performance on those tests, and federal funding linked to those grades has increased pressure on schools to guarantee student performance. Additionally, pressures from business leaders and colleges to produce students capable of writing well in real-world contexts have drawn attention to writing instruction in the K-12 classroom.

According to an interview with the presidents of two national associations for principals, “Underdeveloped literacy skills are the number one reason why students are retained, assigned to special education, given long-term remedial services and why they fail to graduate from high school” (Schmoker, 2007, p. 488). Yet in a 2002 survey by the Department of Education, 40% of eighth grade students reported that their teachers assigned writing that required analysis or interpretation only a few times a year, while 9% stated that their English teachers required only a few assignments a year, with each assignment being a paragraph or less in length (Applebee & Langer, 2006). When teachers do assign writing, many do so without providing the necessary instructional support, focusing instead on the application of mechanical rules and writing assessments that reinforce adherence to those rules. Seminal research by the National Center for Research on Teacher Learning (1991) supported the teaching of writing as “an iterative problem solving process” that requires the writer to constantly negotiate between “the content, the imagined audience, the genres and conventions he needs to work within, and the impact he wishes to have” (p. 34). Yet many practicing teachers received their training from teacher education programs that focused on the mechanical and technical aspects of writing.

To fill the perceived gap between teacher training and student need, some school districts have turned to prepackaged curricula, designed to spell out what the teacher should do—and in
some cases precisely what the teacher should say. Kozol (2005) claimed such curricula provide artificial continuity and characterized scripted programs as “a pedagogy of direct command and absolute control” reminiscent of the philosophies of B. F. Skinner (p. 65). Darling-Hammond (2010) claimed such programs are adopted based on political considerations, rather than on a sound research base, and may sacrifice the key strategies needed for meaningful learning by focusing on subskills which by their nature are easily memorized and tested. Scripted programs also may sacrifice teachers. Kozol (2005) saw the tendency of policymakers to treat teachers as “the lowliest of bureaucrats” as one component in a system that locks out “virtually all the truly human elements of teacher motivation” (p. 297). Kozol (2005) further lamented the “impersonal and mechanistic practices mandated by the states” as demoralizing teachers: “Few teachers … can take it as evidence of even minimal respect for their intelligence to be provided with a ‘teacher-proof’ curriculum” (p. 268).

Research on how scripted curricula affect teacher efficacy can help administrators who may be considering such curricula in their districts. This in-depth exploration of teachers’ experiences while implementing the Lucy Calkins curriculum provides the educational community with greater insight on the possible benefits and limitations of scripted materials, as well as effective approaches to supporting school personnel in its implementation.

**Positionality Statement**

Qualitative researchers cannot separate themselves from the act of inquiry because they “live on the landscape and are complicit in the world they study” (Clandinin, 2006, p. 47). In fact, in some cases getting involved in the “life spaces” of the participants might yield deeper understandings than remaining an aloof observer would (Xu & Connelly, 2010). As a result, I acknowledge that my positionality was a factor in this study. I am a member of the National
Writing Project and a faculty member at a college in the community in which I conducted this research. Many teachers know me as a resource for writing instruction. Others have interacted with me as director of student teaching, in which role I assign teacher candidates to teachers who will mentor them. These roles helped me gain access and trust with participants because they saw me as an insider, a former classroom teacher who still struggled with pedagogical and curricular issues. However, some teachers saw me as an outsider for the same reasons. To neutralize these effects as much as possible, I openly discussed my roles and assured participants that this research was conducted separately from them.

Briscoe (2005) contended that researchers cannot help but examine new situations through the lens of their “history, experiences, and categories” (p. 25). Like most researchers, I have chosen a topic close to my heart, about which I have much curiosity. I belong to several professional organizations that support the teaching of writing, including the International Reading Association; The National Writing Project and its regional chapter, the Hoosier Writing Project; and The Society of Children’s Book Writers and Illustrators. My participation in conferences, both as attendee and presenter, helps to focus and sustain my curiosity about the teaching of writing. While this type of passion may be necessary to sustain a long term investigation, I understand that it may also contribute to bias.

Among the factors Briscoe discussed was the tendency of researchers to “garner the experiences of the oppressed and benefit from the appropriation of these experiences” (2005, p. 28). Although Biscoe was referring to the benefits of researchers from the dominant culture, it is also important to realize that all researchers benefit from this type of appropriation as they describe the experiences of others. As I studied the teaching of writing in classrooms, I relied on
the expertise of teachers to carry out those lessons and on the contributions of students in those classrooms. I worked to properly attribute their role in the research.

Briscoe went on to suggest that a “researcher who is a member of a group is likely to represent the group in a way that constructs a social identity that protects and serves the interest of the group” (p. 28). In the context of her article, Briscoe seemed to imply that this would be a desired effect: that research should stem from within a group and be carried out by members of that group. I would suggest that “serving the interest of the group” is exactly the kind of bias researchers should avoid. It may be true that researchers outside the group lack the insider knowledge to fully understand what they observe, but researchers within the group may lack the comparative lens that the outsider can supply. As a member of the teaching profession, I worked to avoid falling into Briscoe’s proposed pattern of presenting evidence that only served to support teachers. I examined all of the data carefully and sought to report the negative aspects as well as the good.

**Research Question**

This study explored the lived experiences of writing teachers as they implemented a district-wide adoption of a scripted writing curriculum. The primary research question asked: How did elementary teachers at Oak Creek Elementary School experience the required implementation of scripted writing materials in their classrooms?

**Theoretical Framework**

**Self-efficacy.** This study was informed by Bandura’s theory of self-efficacy. In the 1970s Bandura suggested that the prevailing theory of behaviorism did not fully address why some new behaviors persisted and became part of an individual’s behavioral repertoire while other behaviors declined. While behaviorist theories focused on individuals repeating behaviors based
on immediate and personally experienced consequences, linking stimuli with automated response, Bandura (1977) proposed that these stimuli were actually “predictive cues,” processed cognitively “at the level of aggregate consequences” (p. 192). Bandura further postulated that an individual’s likelihood to initiate or pursue certain tasks could be determined by how these cues were interpreted. Rather than there being a direct correlation between a stimulus and a response, how an individual interpreted the stimulus would affect the response. These possible interpretations were divided by Bandura along two lines: outcome expectations and efficacy expectations. The two constructs of self-efficacy differ in terms of the perceived locus of control.

Locus of control denotes the role of perception in linking one’s behavior to an outcome (Rotter, 1966). Rotter distinguished external locus of control from internal locus of control based on one’s perception of the degree to which an outcome was linked to external factors as opposed to one’s own behavior or characteristics (1966). Outcome expectancy is based on a person’s prediction that “a given behavior will lead to a certain outcome” (Bandura, 1977, p. 193). While outcome expectations focus on the predicted results of the behavior, regardless of an individual’s ability to affect that outcome, efficacy expectations are rooted in the belief that one does or does not have control over the outcome. Bandura used the concept of locus of control to define efficacy expectations as connected to an individual’s belief that she or he can “successfully execute the behavior required to produce the outcome” (Bandura, 1977, p. 193).

**Teacher self-efficacy.** The importance of teacher efficacy has been the subject of educational research ever since the Rand Corporation was commissioned in 1969 to study problems in education. The concept of teacher efficacy emerged from researchers seeking to apply Rotter’s locus of control and Bandura’s self-efficacy research to teachers. Teacher efficacy is defined as a “specific case of self-efficacy … directed toward the teacher as an agent of
student achievement” (Ross & Bruce, 2007, p. 50). Guskey and Passaro (1994) further defined teacher efficacy as “the teacher’s belief or conviction that they can influence how well students learn, even those who may be difficult or unmotivated” (p. 628). It is vital to note that self-efficacy is not a measure of how effective a teacher is; self-efficacy refers to the teacher’s perception of his or her own efficacy. The distinction is salient and harks back to Bandura’s claim that future behavior is best predicted not by a person’s prior actions, but by a person’s beliefs. Teacher self-efficacy is important because of its effect on student achievement. Teacher self-efficacy is positively correlated with higher rates of student achievement (Goddard, Hoy, & Woolfolk Hoy, 2004; Ross, 1998; Ross & Bruce, 2007). This effect is bi-directional: high rates of student achievement can cause teachers to feel more efficacious, and when teachers feel more efficacious, student achievement increases (Rimm-Kaufman & Sawyer, 2004).

The construct of teacher efficacy can be divided into two dimensions: teaching efficacy and personal efficacy (Ashton & Webb, 1986). The dimension of teaching efficacy aligns with Bandura’s outcome expectations, gauging a teacher’s belief in the ability of educators in general to affect learning (Soodak & Podell, 1996). The second dimension, personal efficacy, measures a teacher’s belief that the effort an educator puts into teaching predicts student learning. Personal efficacy directly corresponds to Bandura’s efficacy expectation. In studying personal efficacy in helping professions such as nursing and teaching, Cherniss (1993) further separated efficacy into three domains: task efficacy, which refers to the efficacy one feels in executing the technical aspects of the profession; interpersonal efficacy, which refers to one’s perceived efficacy in working with others; and organizational efficacy, which refers to one’s sense of efficacy in effecting change within the workplace. Cherniss’s domains have been applied to education, with researchers treating task efficacy as teachers’ confidence in their abilities to use instructional
strategies effectively, interpersonal efficacy as belief in their ability to engage students and motivate them to value education and put forth the necessary effort to succeed, and organizational efficacy as classroom management (Collie, Shapka, & Perry, 2012; Tschannen-Moran & Hoy, 2001). The differences among these constructs have posed issues for researchers seeking to investigate aspects of teacher efficacy and design appropriate measurement tools. These issues and other developments in the study of teacher self-efficacy are further explored in the literature review.

**Rationale for framework.** Eisner (2001) claimed that theory is “important not only because it satisfies aspects of our rationality, it also distills particulars in ways that foster generalizability” (p. 141). In this study, examining the implementation of a scripted writing curriculum by teachers through the lens of self-efficacy allowed for an examination of the role efficacy expectations play in teachers’ attempts to implement new curricula. The self-efficacy beliefs of teachers are important in studying curriculum implementation because, as Bandura (1986) noted, “People regulate their level and distribution of effort in accordance with the effects they expect their actions to have. As a result, their behavior is better predicted from their beliefs than from the actual consequences of their actions” (p. 129). Examining the beliefs teachers hold about their own efficacy in using a particular program could help predict how well that program will work in the classroom.
Chapter 2: Review of Literature

The purpose of this literature review is to place this study within the context of three bodies of literature. The first section explores teacher self-efficacy, with particular attention paid to factors affecting teachers’ sense of their ability to influence students’ learning. A second stream of literature is related to decision making in education; it examines the power structures that exist in educational systems and how those structures shape curricular adoption and teacher self-efficacy. The third piece revolves around the teaching of writing, investigating teacher training and curricular materials, and concluding with an in-depth look at scripted materials, specifically the Lucy Calkins Units of Study program.

Teacher Self-efficacy

Guskey and Passaro (1994) defined teacher efficacy as “the teacher’s belief or conviction that they can influence how well students learn, even those who may be difficult or unmotivated” (p. 628). Self-efficacy refers not to an objective measure of a teacher’s actual efficacy, but rather to the teacher’s perception of his or her own efficacy. This distinction is salient and harkens back to the Bandura’s (1986) claim that future behavior is best predicted not by a person’s prior actions, but by a person’s beliefs.

Formation of teacher self-efficacy. Teacher self-efficacy is formed early in a teacher’s career and is relatively stable (A. Hoy & Spero, 2005). Using Bandura’s research on self-efficacy as a lens, Ross and Bruce (2007) identified four types of experiences that contribute to the formation of efficacy beliefs in teachers: situations in which teachers viewed themselves as “professionally masterful,” situations in which they observed other teachers with whom they identified as being masterful, occurrences when teachers persuaded one another that they were capable, and events where teachers engaged in “stress-reduction practices” (p. 51). The primary
factor in high self-efficacy is mastery experience, in which the teacher personally experiences effecting change in a hard-to-reach student (Bandura, 1997; A. Hoy & Spero, 2005). These types of experiences are powerful in their ability to affect self-efficacy beliefs because of the first-hand element. Many prospective teachers enter their training in search of the elusive light bulb moment, which they define as the pinnacle of teaching—a time when teachers are able to see that the student has at last grasped a difficult concept. Teachers who enter the profession believing that such moments are indicative of successful teaching are more likely to attach significance to them and to have their own sense of efficacy impacted by them.

Despite the tendency of teacher efficacy to remain stable over time, efficacy can be context specific and susceptible to influence (Edwards, Green, Lyons, Rogers, & Swords, 1998; Fritz, Miller-Heyl, Kreutzer, & MacPhee, 1995; Ross & Bruce, 2007). Due to the nature of teacher training and induction, support varies significantly during the first few years of a teacher’s career (A. Hoy & Spero, 2005). The nature and level of that support can affect teachers’ sense of self-efficacy as they enter the profession. Cherniss (1993) found that systemic factors such as workload, administrative interactions, and bureaucratic requirements may affect self-efficacy. Principal leadership can be a key determinant of these factors. Teachers report higher levels of self-efficacy in schools where the principal creates a shared school vision among faculty and supports teachers by minimizing disruptions (Tschannen-Moran & Hoy, 2007). Formal evaluations by principals, on the other hand, seem to not contribute significantly to a teacher’s self-efficacy formation, perhaps because they are less frequent than other sources of feedback (Tschannen-Moran & Hoy, 2007). Even teachers who believe they possess the skills to be effective may still find situational obstacles in the way of achieving desired outcomes, thus affecting self-efficacy.
Attempts to combat the effects of low teacher self-efficacy have focused mainly on professional development and peer-coaching models. Professional development is commonly a condition of teacher licensing or employment within the district and is provided at no cost to teachers. Several studies have examined the effects of efforts to increase teachers’ self-efficacy through professional development. Ross and Bruce (2007) found that professional development that allows for social comparison through observing the successes and failures of other teachers may influence a teacher’s belief that she or he would have a similar experience with the modeled methodology. This effect is mediated, however, by the degree to which the observer identifies with the model (Bandura, 1977; A. Hoy & Spero, 2005; Tschannen-Moran & Hoy, 2007). If the observer does not view the model as similar in terms of training or experience, then the effect of the modeling is lessened. Professional development that is specifically related to the content being taught has also been found to be effective if the professional development is ongoing, rather than a one-time exposure (Gulamhussein, 2013; Tschannen-Moran & Johnson, 2011). This sustained exposure to professional development allows teachers to process the desired information and techniques and to consider issues of implementation within their own classrooms (Gulamhussein, 2013).

One method of professional development that is thought to raise self-efficacy is peer-coaching. The rationale for focusing on peer-coaching stems from the connection between Bandura’s self-efficacy and social cognition theories. While the strongest influence on self-efficacy comes from mastery experiences, in which teachers directly experience success, secondary sources may also impact self-efficacy. Social cognition theory explores the manner in which social structures affect human behavior and is relevant to discussions of self-efficacy because of how those social processes can influence belief sets. Bandura (1999) noted that
psychosocial factors can influence how people interpret and adapt to new information and whether they perceive new strategies as something to be avoided or incorporated into their own behavioral sets. Peer-coaching allows psychosocial factors to be directly manipulated through modeling and discussion. Assurance of efficacy by an administrator or colleague, especially if the target teacher has little experience on which to gauge his or her own efficacy, can contribute to a rise in perceived self-efficacy (Ross & Bruce, 2007). Several factors may influence the effectiveness of peer-coaching, with matches between peers’ genders and teaching situations the most readily identifiable (Tschannen-Moran, & Johnson, 2011). This may be similar to the identification factor noted in peer modeling during professional development.

Another approach to professional development is through professional organizations specific to the domain being taught. Pella (2011) studied the effects of such an approach on the pedagogical understandings of middle school language arts teachers taking part in the National Writing Project. Pella (2011) described the National Writing Project as “a social learning network for teachers” designed to foster knowledge co-construction” (p. 109). Pella (2011) posited that the social nature of professional learning communities allowed teachers re-examine their own beliefs and practices in light of the beliefs and practices of others. When attempting to adopt new ideas about writing, teachers must balance the perceived benefit to their students against the risk of disapproval from colleagues. Pella found professional learning communities to be a valid way for teachers to navigate the terrain of change. Caswell (2007) also examined the National Writing Project’s effect on teacher understandings regarding writing. In his doctoral thesis, Caswell suggested that “reflection with continual collaboration” effects a change in understanding (p. 190). Caswell noted the importance of voluntary participation in a learning group and stated that active and ongoing involvement supports transformative learning.
Measurement of teacher self-efficacy. Surveys have been the primary means of measuring the self-efficacy of teachers. In one of the first such studies, the Rand Corporation inserted two questions based on Rotter’s locus of control theory into a survey. The Rand survey questions were designed to access teachers’ beliefs regarding whether teachers or the environment held more power to reinforce student behavior and found that when teachers believed they could overcome environmental factors to motivate students, student achievement improved (Armor, Conroy-Oseguera, Cox, King, McDonnell, Pascal, Pauly, & Zellman, 1976). Gibson and Dembo (1984) modified the instrument used in the Rand study to create the Teacher Efficacy Scale (TES).

In the 1980s several separate groups of researchers recognized that student achievement might not be solely influenced by teachers or environment, but rather by an interaction of factors. Guskey (1981) designed a scale intended to measure how much responsibility teachers felt for the academic performance of their students. Guskey’s Responsibility for Student Achievement questionnaire (RSA) was based on Rotter’s locus of control theory and sought to measure internal versus external locus of control in teachers. This scale paid particular attention to including and isolating feedback between situations in which the teachers accepted responsibility for positive versus negative student achievement. Guskey (1981) found that teachers were more likely to accept responsibility for positive student achievement. The RSA also considered whether factors such as teacher gender, years of experience, and grade level influenced internal versus external locus of control for student achievement. According to the findings, female teachers were significantly more likely than male teachers to accept responsibility for improvement in students’ achievement. Differences in grade level and years teaching did not significantly affect how teachers attributed student achievement, although there was a slight
tendency for teachers in elementary and high school to be more likely than middle school teachers to take responsibility (Guskey, 1981).

At the same time that Guskey was working on the RSA, other measurements were being explored. To that end, Rose and Medway (1981) developed the Teacher Locus of Control survey (TLC), which required teachers to determine responsibility for students’ successes and failures. The TLC, which specifically measured aspects of teaching, was found to be more predictive of teachers’ behaviors than Rotter’s Internal-External scale (Tschannen-Moran & Hoy, 2001).

While studies of teacher self-efficacy have drawn attention to important issues, investigators have recently pointed out conceptual and measurement problems within the body of existing research (Henson, 2001; Klassen, Tze, Betts, & Gordon, 2011; Tschannen-Moran & Hoy, 2001; Wheatley, 2005). These flaws originate primarily from an emphasis on Rotter’s locus of control, wherein teachers remark on their ability to control student outcomes, rather than on Bandura’s concept of teachers’ efficacy to teach students (Klassen et al, 2011) or on how the context of the teaching situation may impact self-efficacy rather than the teachers’ self-efficacy beliefs (Coladarci & Breton, 1997; Guskey, 1987; Tschannen-Moran & Hoy, 2001; Tschannen-Moran & Johnson, 2011; Wheatley, 2005). Wheatley (2005) found that the questions on many of the self-efficacy rating scales could be interpreted in multiple ways, making it difficult to use their answers. Specifically, Wheatley noted four interpretation issues with responses: ambiguous wording regarding source of teachers’ beliefs, ambiguous wording regarding the types of students being taught, lack of contextual information related to the subject matter, and possible influences of teachers’ political and personal situations or stances. Recognizing how context can influence self-efficacy, researchers have looked specifically at relationships between self-efficacy and school climate (Collie, Shapka, & Perry, 2012; Hipp & Bredeson, 1995; W. Hoy &
Woolfolk, 1993; Lee, Dedick, & Smith, 1991; Taylor & Tashakkori, 1995; Tschannen-Moran & Hoy, 2007), self-efficacy and the type of student being taught (Coladarci & Breton, 1997), and self-efficacy and the country in which the teacher teaches (Klassen et al., 2009). Researchers have also worked to develop instruments to measure teachers’ self-efficacy in certain subject areas, such as science or math (Czernaik, 1990; Enochs, Posnanski, & Hagedorn, 1999; Mulholland & Wallace, 2001; Riggs & Enochs, 1990) and literacy (Szabo & Mokhtari, 2004; Timperley & Phillips, 2003; Tschannen-Moran & Johnson, 2011). One potential problem with such measures is that too much specificity can affect the validity of an instrument (Tschannen-Moran & Hoy, 2001).

A further complication in measuring teacher self-efficacy has been determining whether to approach teacher self-efficacy as a norm-referenced or self-referenced construct. Teachers tend to compare their own abilities to those of other teachers, not to some external standard (Ashton, Buhr, & Crocker, 1984). If self-efficacy measurement scales take this into consideration and ask teachers to compare themselves to other teachers, then the nature of teacher relationships is an important factor. In most schools teachers do not have opportunities to observe one another during actual teaching situations. Therefore many of teachers’ beliefs about the efficacy of other teachers are based on what they may glean from conversation or assumptions (Ashton et al., 1984). In addition, researchers measuring self-efficacy have noted the influence of social desirability on participant responses (Ashton, Olejnik, Crocker, & McAuliffe, 1982; Crowne & Marlowe, 1960; Joinson, 1999; Phillips & Clancy, 1972; Wheatley, 2005). Social desirability is the tendency of participants to under-report what they perceive as socially undesirable traits while over-reporting traits that they consider socially acceptable (Phillips & Clancy, 1972; Wheatley, 2005). Ashton et al. (1984) constructed a forced choice tool called the Webb Efficacy
Scale. Using this scale, they found that social desirability had more influence on self-efficacy scores when teachers were asked to rate themselves using vignettes that were self-referenced rather than norm-referenced (Ashton et al., 1984; Tschannen-Moran & Hoy, 2001).

**Relevance of teacher self-efficacy to current study.** This study explored the lived experience of teachers as they implemented a new program of study, specifically how a scripted writing program affected teachers’ self-efficacy. Research has shown that teachers’ self-efficacy is important in determining how teachers will implement new curricular materials. As early as 1977, researchers found a strong positive link between a teacher’s sense of self-efficacy and the likelihood that the teacher would implement new projects successfully (Tschannen-Moran & Hoy, 2001). Czernaik (1990) found that teachers who were high in self-efficacy were more likely to implement reform-based models of teaching. Self-efficacy can also predict the types of new initiatives that teachers will undertake (Ross, 1998) and the amount of time they will spend teaching subject matter (Riggs, 1995; Riggs & Enochs, 1990). The current study explored how implementing a mandated writing program affected teacher self-efficacy. Therefore, a thorough understanding of teacher self-efficacy was germane.

**Educational Power Structures and Curricular Adoption**

In order to explore the lived experiences of writing teachers as they implemented a district-wide adoption of a scripted writing curriculum, it was necessary to view the act of teaching as a nested experience existing within the context of the larger educational system. Early education philosopher John Dewey (1934) defined the purpose of education as “to give the young the things they need in order to develop in an orderly, sequential way into members of society” (p. 12). If one accepts teaching as the work of preparing a nation’s future citizenry, there are many stakeholders in the outcome of that process. Federal, state, and local government
officials; business leaders; faculty and administrators of educator preparation programs; parents; teachers; and even students themselves all seek to have voice in the materials and methods used to educate students.

Teacher professionalism, federal and state mandates, district-level decision making, and the influence of big businesses all play a role in how the pedagogy of writing is perceived and which approaches are embraced within the schools. The extent of influence wielded by different groups of stakeholders has shifted over the years. These stakeholders often exert pressure for reform through policy at the local, state, and federal levels. Policy makers, by the nature of their status as outsiders to the school setting, must make decisions based on information provided to them. One primary source of information that policy makers often turn to is statistical data (Au, 2011; Madaus, 1988). Statistical data relies upon first defining the terms being studied. The field of literacy education has undergone drastic definitional changes. Literacy, a construct that was first measured in the United States as part of the 1790 census, has shifted from being defined as an individual’s ability to sign one’s name to a comprehensive evaluation of performance on literacy tasks (Elliott, 1996). The complex definition of what it means to be literate has led to an increasing reliance on standardized testing in the schools as a source of data (Elliott, 1996; Madaus, 1988).

**Legislation and the standardization movement in education.** Interpreting data related to student achievement is no easy task, yet stakeholders often use that data to uphold claims about the efficacy of teachers or schools. In 1983, a report issued by the White House asserted, “The educational foundations of our society are presently being eroded by a rising tide of mediocrity that threatens our very future as a nation” (National Commission on Excellence in
Education, 1983, p. 5). This claim was based in part on standardized test scores, citing the following:

- the average achievement of high school students on most standardized tests is now lower than 26 years ago when Sputnik was launched;
- both the number and proportion of students demonstrating superior achievement on the SATs (i.e., those with scores of 650 or higher) have also dramatically declined; and

Researchers have questioned the validity of those claims (Berliner & Biddle, 1995; Carson, Huelskamp, & Woodall, 1993), yet, whether the criticisms raised by A Nation at Risk are substantiated or not, the report advised massive reform efforts and laid the groundwork for a series of critical reports from future administrations. These reports led to a movement for reform through the creation of educational standards.

Standards-based reform emerged from the belief that reform efforts are more likely to be effective when there are agreed-upon goals (Hamilton, Stecher, & Yuan, 2008). To that end, many states developed grade-level standards that outlined what students were expected to know and be able to do at the culmination of each academic year. The No Child Left Behind Act of 2001 elevated standardized testing and standards-based education to a mandated basis for determining federal funding (Au, 2011; No Child Left Behind [NCLB], 2002). In order to understand the sway federal funding can exert over curricular decisions, it is necessary to
remember that in the United States, educational power is reserved to the states by the 10th Amendment, but the 14th Amendment requires that all individuals have equal access to their rights. This distinction has resulted in most educational decisions, including the responsibility for funding, being made at the state and local levels. The federal government may step in, however, if an individual’s rights are jeopardized. This has been demonstrated in the case of Title VI of the Civil Rights Act of 1964, which prohibits discrimination based on race, color, or national origin; the Elementary and Secondary Education Act (ESEA) of 1965, which provides federal funding for educating disadvantaged youth; Title IX of the Education Amendments of 1972, which prohibits discrimination on the basis of gender; and the Individuals with Disabilities Education Act (1975), which requires free access to education for students with disabilities. The federal government exerts the power to enforce this legislation through the promise or denial of federal funding.

The No Child Left Behind Act of 2001 links standardized test scores to federal funding. States are required to set achievement targets, and the measure of progress toward that target is calculated through students’ scores on standardized tests. Schools that do not make “adequate yearly progress [AYP]” face penalties in the form of loss of funding and, in the case of repeated failures to attain AYP, state intervention. While emphasis on test scores has already been recognized as having the power to shape the curriculum (Au, 2011, 2013; Cohen, 1988; Mathison, 1991; Mathison & Freeman, 2003; Popham, 1987), the No Child Left Behind Act of 2001 goes beyond the possibility of incidentally influencing curriculum to outright requiring school-wide reform strategies that “use effective methods and instructional strategies that are based on scientifically-based research.” This directive stretched the federal government’s reach into the arena of curricular decisions. Subsequent legislation has deepened that reach, and by the
early 2000s, all 50 states had formalized their own systems of standards and assessments (Hamilton et al., 2008). In an effort to ensure that students in all states are held to the same benchmarks, in 2008 the National Governors Association developed the Common Core Standards, which have been adopted in 45 states. Proponents of the Common Core curriculum heralded it as a way to clearly compare student and school performance, guarantee high expectations for all students, and ease the transition for students across district and state lines. Those in opposition to standardizing education cited the narrowing of curriculum (Au, 2011, 2013; Mathison, 1991; Rubin, 2011; Smith & Kovacs, 2011; Srikantaiah, 2009) and deskillling of teachers (Au, 2011; Ball & Cohen, 1996; Rubin, 2011; Shannon, 1987; Smith & Kovacs, 2011) as potential outcomes.

**The impact of organizational structure on change.** Weick (1976) explored the organization of school systems as a potential factor in why curricular adoptions fail. Because of their familiarity with factory and bureaucratic models, most people tend to think education should follow those models. Weick claimed that the nature of our educational system is not the same as bureaucracies or factories. Rather, Weick conceptualized schools as loosely coupled systems, which he differentiates from the tightly coupled systems of bureaucracies and factories based on the degree to which actors within the systems share variables. Applied to education as a system, this means that while administrators and teachers are both focused on student learning, one must study the overlap of the variables each actor controls to determine the organization’s coupling. The most important variable seems to be shared identity. As mentioned previously, in the United States educational standards are legislated at the state level. But within each state, school districts are responsible for defining how the schools under their purview will enact the state standards to effect student learning. Even district-level decisions may not be enacted
identically within individual schools. Each school has its own administrator (principal) and often
develops a distinct personality based on the shared characteristics of its teachers and students.
This individualization at the school level contributes to loose coupling within the system (Horne,
1992). While localized identity is beneficial for tailoring curriculum and instruction to the needs
of the community, varying identities within an organization impact the overall ability of the
district to implement change. This is especially true in the case of initiatives that seek to
standardize practices or results (Weick, 1976). The concept of schools as loosely coupled
systems is important to a discussion on curricular change because it explains in part why changes
initiated at the federal, state, or even district levels do not necessarily become manifest at the
classroom level. Policies enacted at state or district levels may be ignored or changed to fit local
needs (Spillane, 1999).

The notion of loose coupling is also relevant to a discussion of efforts to increase student
achievement through curricular change. Teachers have long lamented the product-in, product-out
mentality encouraged by proponents of standardized testing. Some have suggested that rather
than the educational system being similar to a factory and students to widgets, schooling is more
like farming (Stephens, 1967; Weick, 1976). Students are not raw materials upon which a teacher
may perform a certain function and receive a guaranteed result, but complex organisms
influenced by the complexity of their environments. Ball and Cohen (1996) noted that teachers
work across five intersecting domains as they consider how to best use curriculum: students’
needs and abilities, teachers’ needs and abilities, instructional modes, class environment, and
community. Each of these areas requires teachers to prioritize different aspects of the learning
process and may in fact work at cross-purposes to one another. Empowering teachers to take that
complexity into account when choosing instructional methods and materials can help them feel
more capable of reaching their students (Ball & Cohen, 1996; Tschannen-Moran & Hoy, 2007, Weick, 1976; Wheatley, 2005).

In some districts there has been a push for greater teacher involvement in the decision-making process (Duke, Showers, & Imber, 1980). Perhaps in acknowledgement that teachers may know their students best, some districts have encouraged teachers to take an active role in the creation of policies and the selection of curricular materials. In other districts teacher organizations have advocated for shifting more power to teachers. In a survey of the literature on teacher involvement in decision making, Duke et al. (1980) found that teachers typically cited three advantages to involvement: increased feelings of self-efficacy, more instances of democracy in the workplace, and increased sense of ownership. This sense of ownership is important when it comes to implementing planned changes. When teachers feel they have helped choose a curricular path, they will implement it with greater fidelity (Datnow & Castellano, 2000; Fullan & Pomfret, 1977).

Even so, participatory decision making has not been embraced as widely as some had hoped. Serving on committees and attending meetings can take a teacher’s attention away from the classroom. While teachers are often willing to invest extra time in making their schools a better place, they may become discouraged. Often teachers view participatory decision making as an exercise in smoke and mirrors, where the administration invites teachers input, but not on substantial matters. This leads teachers to feel that the effect of their participation is not worth the effort and undermines teacher involvement in decision making as a vehicle for curricular change (Duke et al., 1980; Fullan & Pomfret, 1977; Stein & D’Amico, 2002).

**Types of curricular change: Materials versus methodology.** Often reform efforts have focused on curricular materials as a means to influence what is taught (Ball & Cohen, 1996;
Bruner, 1960; Dow, 1991; Elliot, 1996; Mathison & Freeman, 2003). Textbooks dictate instruction, workbooks prescribe practice materials, and premade tests measure learning: together, these in essence give technical control of instruction to those who design the materials (Shannon, 1987). In the age of standardization, textbook manufacturers are even explicitly aligning their texts with the Common Core or State Standards, ensuring that all state goals are met. Textbooks are not the only form of commercial material used in schools. Since the No Child Left Behind Act of 2001, with its requirement that school reform be based on scientifically-based research, school systems have become more reliant on prepackaged commercial programs. Such programs may be highly prescriptive, even to the point of including a script of what the teacher should say when teaching.

Many curricular innovations are not simple strategies that blend seamlessly with existing practice, but rather changes that require teachers to reconsider deeply held beliefs about the roles of students and teacher in the classroom (Spillane, 1999). Many school systems have turned to professional development as a method of introducing teachers to techniques. Professional development models vary, but until recently most involved brief exposure to a new method or strategy, usually offered by an outside expert, during a half to full day inservice (Ball & Cohen, 1996; Fang, Fu, & Lamme, 2004). Little support was given to teachers as they went back into their classrooms to implement those strategies with real students. Spillane (1999) suggested that it is in these “zones of enactment,” that teachers find space to grapple with translating the theoretical into practice. It is this translation that allows for true learning. To support that learning, some schools have changed the structure of professional development to include ongoing support. Such support may include on-site consultation from experts, study groups, coaching, peer mentoring initiatives, and the establishment of communities of practice (Spillane,
1999; Stein & D’Amico, 2002). These types of sustained professional development have increased the new strategies’ effect on student achievement (Darling-Hammond, 2000; Fang et al., 2004).

Often educational innovations do not flourish (Fullan & Pomfret, 1977; Horne, 1992; Poole & Okeafor, 1989; Spillane, 1999; Stein & D’Amico, 2002; Weick, 1976). While those peddling curricular change in the form of prepackaged materials or a set of directives may imply that curriculum innovation is a one-size-fits-all fix, many factors go into successful implementation. Fullan and Pomfret (1977) explored implementation in terms of fidelity versus mutual adaptation. Fidelity describes the extent to which the implementation of innovation matches the intent of the innovation (Fullan & Pomfret, 1977). Complete fidelity is not always the answer to increased student achievement. For many curricular adoptions to succeed, teachers must apply their own knowledge of the students and learning community, adapting to the curriculum while also adapting the curriculum to meet the specific needs of the setting (Fang et al., 2004; Frank, Zhao, Penuel, Ellefson, & Porter, 2011; Fullan & Pomfret, 1977; McLaughlin, 1976; Pearson, 1996).

Relevance of educational power structures and curricular adoption to current study. This study explored the lived experience of teachers as they implemented a new program of study, specifically how the district-wide adoption of a scripted writing program affected teachers’ self-efficacy. Research has shown that educational power structures are important in determining how teachers will implement new curricular materials. The current study explored how implementing a mandated scripted writing program affected teacher self-efficacy. Therefore, understanding the decision making process behind the decision to adopt the Lucy Calkins Units of Study program in the school district had bearing on this study.
**Teaching Writing**

To understand the lived experiences of writing teachers as they implemented a district-wide adoption of a scripted writing curriculum, it was helpful to examine the nature of writing instruction in the United States.

**Skill-based versus process-based orientations.** In the United States, there are two main schools of thought regarding writing instruction: skill-based and process-oriented approaches. Similar to the phonics approach to teaching reading, the skill-based approach primarily envisions writing as a set of discrete skills to be learned (Dahl & Freppon, 1995; National Center for Research on Teacher Learning, 1991). Writing is taught as grammar, punctuation, and spelling—sub-skills of composition—which must be mastered prior to tackling the complex task of writing. Late in the 20th century, many educators turned to an approach known as whole language instruction. The whole language movement encourages teachers to view the acquisition of written language as parallel to the acquisition of spoken language (Goodman & Goodman, 1976). Just as children learn to speak when surrounded by those who speak, proponents of the whole language movement support a shift away from basal readers and worksheets and toward trade books and children’s own writings as authentic texts (Ryan & Goodman, 2016). Yet, as Foorman (1995) argued, there are “profound dissimilarities in the psychogenesis of language and literacy,” and emerging a child in written language does not circumvent the need for explicit instruction in alphabetic coding. Proponents of the process-oriented approach believe that children discover the patterns and rules necessary to become fluent readers and writers through exposure to printed words and opportunities to experiment with language. Rooted in the whole-language movement, a process approach to writing instruction advocates for a holistic model in
order to show children that writing represents language and meaning (Gunderson & Shapiro, 1988) and that grammar, punctuation, and spelling are tools in building that meaning.

Despite the arguments for one method or another, research indicates that the most effective instruction occurs when teachers purposefully combine methods based on their understandings of students’ needs (Armor et al., 1976; Cutler & Graham, 2008; Barrs, 1983; Bond & Dykstra, 1967; Duffy & Hoffman, 1999; Ede, 2006; Pearson, 1997; Stahl & Miller, 1989). In fact, Graham, Harris, Fink-Chorzempa, and MacArthur (2002) found that the majority of primary grade teachers held complex views on writing instruction and incorporated both skill-based and process-based methodology. Often this approach manifests in the form of a writing workshop approach.

**Writing workshop approach.** The writing workshop approach grew out of the observations of Donald Murray, who suggested that rather than teaching children writing skills in isolation, those skills might best be learned the way adult writers use them: in the context of real writing. Proponents of the workshop model challenge teachers to provide opportunities for students to “write with purpose and intention” (Ray & Laminack, 2001, p. 4) and to create time for “sustained, daily writing across the curriculum of mostly self-chosen topics” (Routman, 2005, p.7). This directive manifests in a variety of ways in classrooms, but usually consists of minilessons, independent writing, conferencing, and follow-ups to minilessons (Atwell, 2002). Graves (1984) contended that the writing conference is the pivotal factor in developing self-critical writers. Whether these conferences are between the student and the teacher or among peers, the primary purpose of the conference is to allow writers to express what they had strived to accomplish (Laman, 2011) and to receive feedback on that attempt.
Although the writing workshop approach is widely embraced, it is not universally accepted. Critics point out that there is a difference between the process of learning to write and the process of writing (Barrs, 1983; Kress, 2005). Barrs (1983) described the purpose of writing as fundamentally affecting the process of writing and contended that when teachers overlay adult purposes onto children’s attempts at writing they take away some of the discovery that makes writing intrinsically meaningful to the writer. Further, when engaging in conferences with young writers, teachers often default into the role of “primary-knower” and dominate the conversation, speaking an average of four times more than the student (Hawkins, 2016).

**Scripted curriculum.** As noted in the previous section on curricular adoption, stakeholder pressure to ensure student achievement has, in some cases, led to the adoption of prepackaged curriculum. Writing instruction is not immune to that pressure, and several scripted writing programs compete for use in schools. Support for scripted programs is based on the belief that they systematize instruction, guiding teachers through the steps of explicit instruction (McIntyre, Rightmyer, & Petrosko, 2008). This step-by-step scripting serves to lessen the “variability in teacher performance” and “decrease teacher interference” (Reeves, 2010, p. 244). Scripted curriculum also has the potential to function as professional development for teachers (Atwell, 2002; Ball & Cohen, 1996; Fang et al, 2004; Reeves, 2010; Valencia, Place, Martin, & Grossman, 2006). By providing well-researched methods, scripted materials may act as support for teachers as they learn to teach the material or attempt to enact a new strategy (Atwell, 2002; Bartel, 2005; Valencia et al., 2006). Reeves (2010) described such support as an external expert that teachers may rely upon until they grow confident in their own expertise, but aligned with Fang et al. (2004) in cautioning that for curricular materials to truly function as scaffolding rather than constraints, the scripts would need to be designed to encourage the teacher to continually
internalize aspects of them and increase instructional decision making instead of encouraging complete fidelity and compliance.

It is that compliance that causes many to criticize scripted curricular materials. The insistence that teachers stick to the script can have negative effects on teachers and students alike. Teachers who have been trained as reflective decision makers may feel demoralized when that decision making is taken away from them (Fang et al., 2004; Feinberger, 2007). Teachers may also become overly reliant on the scripts and fail to develop the expertise necessary to meet their students’ needs (Fang et al., 2004). Students rely on their teachers to take their individual needs into account, but scripted materials severely limit the teachers’ ability to differentiate instruction (Parks & Bridges-Rhoads, 2012). In her discussion of the writing workshop approach, Atwell (2002) suggested that minilesson topics should grow from teachers’ observations of gaps in the students’ knowledge or skills. Scripted programming often provides a series of minilessons to be taught in a predetermined order, irrelevant of anything the teacher may know about her or his own students. Furthermore, if young writers are to learn that their writing can be used to “say big, important things in their lives and to make important things happen” (Ray & Laminack, 2001), providing predetermined topics takes away the children’s voice in what is important to them.

Scripted materials also restrict a teacher’s ability to take advantage of the teachable moment when a student does or says something that connects to a new learning opportunity, deepening understanding and broadening application (Parks & Bridges-Rhoads, 2012). Scripted programming often encourages the teacher to ignore or redirect students until the desired answer is given rather than responding to the unexpected answer. This approach can lead students to
become overly dependent on finding the one right answer, discouraging divergent thinking and problem solving (Parks & Bridges-Rhoads, 2012).

In the United States, there are four main scripted programs for the teaching of writing in elementary schools: Expressive Writing, Write Reflections, Reasoning and Writing, and the Lucy Calkins’ Units of Study curriculum. The current study explored how teachers implemented the Lucy Calkins Units of Study curriculum in their classrooms. A brief overview of that program follows.

**The Lucy Calkins Units of Study curriculum.** The Units of Study curriculum is heavily influenced by the writing workshop model and includes many of the same components, such as minilessons, independent writing, conferencing, and follow-up to minilessons. Structured as four 6-week units per grade level, the program is divided into elementary (Grades K-5) and middle school (Grades 6-8) segments. Grade-level units guide teachers through material related to opinion, informative, and narrative writing.

Calkins’ theoretical work reflected a belief that collaboration and choice were important, stating that “teaching is an activity that the teacher, her colleagues, and her students invent together” (Barrs, 1983; Calkins, 2003, p. iii). Research supports that view, finding that such collaboration allows students to merge their own sociocultural and textual experiences with that of the teacher and school culture, while still maintaining agency in their learning (Dyson, 2001; Newkirk, 2007). Despite Calkins’ claim that choice and collaboration are vital, critics suggest that the message shifts in the materials provided to teachers, so that “in the scripted curriculum, the genres dictated the writing rather than children making decisions on genre” (Yoon, 2013, p. 156). Calkins discouraged fiction writing in her approach, focusing instead on nonfiction and personal narrative because those genres lend themselves better to teaching revision (Barrs, 1983;
Newkirk, 2007). The effect of this model is to overlay adult values and purposes onto children’s writing and devalue the role of popular culture in students’ lives (Dyson, 2001; Newkirk, 2007).

Another shift between the writing workshop model and Calkins’ approach is in the role of conversation in a writing classroom. In initial writing workshops, interaction is considered valuable, if not essential, to the writing process. Writers are encouraged to co-construct meaning with the teacher and one another. In this scripted model, children’s interjections are seen as tangential; teachers are told to discourage such “interruptions” (Calkins & Oxenhorn, 2003, p. 3) and to teach children the proper way for writers to confer with one another by modeling conversations that have been described as “artificial and contrived” (Yoon, 2013, p. 158).

Conclusion

Due to the implementation of state standards and the link between high-stakes testing and federal funding, what happens in the classrooms of America has come under more and more scrutiny. With multiple agencies claiming to be stakeholders in our schools’ educational processes, instructional decision making, which was once left up to teachers, has become a group process. One of the ways that stakeholders seek input is through curricular adoptions. While teacher input is often sought during that process, unanimous acceptance is rare and district-wide implementation of materials has the potential to be met with resistance due to the wide range of teaching philosophies.

According to Teacher’s College, the Calkins’ Units of Study writing curriculum has been adopted by thousands of school districts across the United States and internationally (“Our History,” 2014). Research into how teachers navigate the district-mandated adoption of such scripted programming, including the effect scripted programming has on the self-efficacy of
teachers, provides valuable insights for districts considering such materials, as well as support for teachers who are attempting to implement this model.
Chapter 3: Methodology

This qualitative study explored, through interpretative phenomenological analysis (IPA), how teachers’ experiences during district-mandated implementation of scripted writing materials shaped their approaches to writing instruction and their own sense of self-efficacy.

Research Design

Eisner (2001), credited as instrumental in the evolution of qualitative research, wrote that he hoped those who create policies might one day use qualitative research as a way to understand the effect of their policies on the people they are trying to influence. This study answered Eisner’s call by exploring the lived experiences of teachers as they implemented a district-wide mandate to use a scripted curriculum in their classrooms. A qualitative approach affords a holistic perspective that was particularly suitable to this exploration.

Quantitative research allows for the isolation and consideration of specific variables and relationships, while qualitative research allows a researcher to focus on the complexity of situations (Berg, 1989; Marshall & Rossman, 2010; Patton, 1980). In the current study, there were multiple variables at play: the nature of scripted curriculum, the issue of agency in curriculum adoption, the construction of teacher identity and efficacy in the socialized setting of schools, political pressures for accountability, and countless others. Rather than attempting to isolate each variable, this study explored the interplay of the variables in the participants’ lived experiences, allowing meaning to be formed through the lens of participants’ perspectives.

Creswell (2013) contended that the methodology one employs in qualitative research is not handed down from theory, while acknowledging that theory does play a role in directing a researcher toward preferred approaches. Constructivism plays a primary role in work related to teacher knowledge and appropriation. In seeking to understand the effect of district mandates and
scripted curriculum on teachers’ instructional decision making and sense of efficacy, this study used a constructivist approach, collecting data that allowed a deeper understanding of how teachers perceive themselves and their practice. Teacher perception is not a quantifiable construct, but rather falls into the realm of what Eisner (1993) identified as the “contents of consciousness.” Eisner (1993) implored those who seek to understand cognition and emotion not to shy away from the immeasurable, but to approach it as one would abstract art, using representation to transform “the contents of consciousness into a public form so that they can be stabilized, inspected, edited, and shared with others” (p. 6). Qualitative research allows a researcher to understand the meanings that emerge from the “negotiated interpretation of objects, events, and situations” (Berg, 1989, p. 9) and share them with others, including, perhaps, Eisner’s policy makers.

**Research Tradition**

In order to most deeply access teachers’ perceptions of how district mandates and scripted curriculum affected their instructional decision making and sense of efficacy, the current study employed an interpretative phenomenological analysis (IPA) design.

To capture the heart of what goes on in classrooms, one must look beyond an examination of discrete factors, such as time on task, ratios of student-to-teacher interactions, and student performance, to the personal connections between teacher and student that make learning relevant and meaningful. As Paley suggested, “None of us are to be found in sets of tasks or lists of attributes; we can be known only in the unfolding of our unique stories within the context of everyday events” (1990, p. xii). To better understand how IPA was best suited to explore the unfolding of these unique stories, it is necessary to briefly explore the two theoretical
axes that inform the IPA model: phenomenology and hermeneutics. A short description of each axis follows, with emphasis on how each is foundational to IPA.

**Phenomenology.** *Phenomenology* seeks to describe the essential qualities of an experience, prior to the analysis of reflection (Smith, Flowers, & Larkin, 2009). Originally put forth by Husserl, phenomenology is a philosophical approach by which one reduces an experience to what is “immediate to our consciousness” (Dowling, 2007, p. 132). Philosophers following Husserl proposed that value may come from recognizing the situated nature of experience, while still seeking to understand how individuals process those experiences (Dowling, 2007; Smith et al., 2009). Phenomenological research has been operationalized most notably in the social sciences, particularly nursing and psychology. Heidegger questioned whether it is possible to examine an experience without being influenced by prior experiences and preconceptions (Dowling, 2007; Smith et al., 2009). Heidegger’s work to develop a scientific stance whereby one could explore the fore-structures brought to an experience in light of the experience itself has contributed to the link between phenomenology and hermeneutics.

**Hermeneutics.** *Hermeneutics*, distilled to its most simple definition, is the theory of interpretation. Proponents of hermeneutics contend that understanding the experience of another person is a complex process, one which requires the interpreter to understand the mindset of the subject. Applied to IPA research, hermeneutics describes the process of a researcher attempting to make sense of the participant trying to make sense of an event (Smith et al., 2009). To access how one experiences an event, heterophenomenology requires that a researcher interview a participant and seek to “compose a catalogue of what the subject believes to be true about his or her conscious experience” (Dennett, 2003, p. 20). This deep understanding involves more than just recording the words the subject uses to describe his or her experience; it is also influenced
by the nuances of language and by both the subject’s and the interpreter’s previous experiences, traditions, societal contexts, beliefs, etc. (Freeman, 2008; Pietkiewicz & Smith, 2014; Smith et al., 2009).

Because the goal of the current study was to deeply explore the personal and situational factors that affected teachers as they made sense of their experience implementing a district-wide mandated adoption of the Lucy Calkins Units of Study writing program, it was necessary to use an approach that could capture context and begin to make explicit previously hidden factors of causality through an examination of the participants’ own sense-making about their experiences. IPA, with its emphasis on phenomenology and hermeneutics, was well suited to this purpose.

**Participants and Access**

IPA research is idiographic, in that its primary goal is to explore a small, homogeneous sample in order to explore the similarities and differences in the way participants experienced one particular event (Smith et al., 2009). The event itself offers the boundaries for selecting participants: only people who have experienced the phenomena may serve as potential participants. IPA also has much in common with ethnographic research because of its focus on a specific group (Smith et al., 2009). The goal is not to describe how everyone would experience the phenomena, but rather to explore how a particular subset of a population experienced the phenomena. This leads to purposeful sampling of a small, homogenous population, usually from one community. While other traditions may seek representative samples, in an IPA study it is sufficient to look for a specific sample that provides the best opportunity to learn (Smith et al., 2009). The school site in this study was selected based on ease of access and the school’s likelihood of providing variety in the attribute under study, that of teacher experiences while implementing the curriculum. From this site, participants were recruited from a prospect pool.
that included the 12 third, fourth, and fifth grade teachers. Participants were selected based on their willingness to participate and the likelihood they would provide a variety of information and an opportunity to learn, both of which Stake (1994) suggested were primary determinants for selection. The number of participants was limited to six teachers, in order to allow for the inductive logic of the interpretative phenomenological approach and for well-developed themes to emerge and to provide opportunities for cross-case analysis (Creswell, 2013). This small sample size also offered opportunities for uncovering the alternate realities reflected in sacred, secret, and cover stories (Connelly & Clandidin, 2000). Table 1 highlights the participants’ teaching experience.

Table 1

<table>
<thead>
<tr>
<th>Participant</th>
<th>Grade level</th>
<th>Years at current grade level</th>
<th>Years teaching</th>
<th>Highest degree obtained</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abby</td>
<td>5</td>
<td>2</td>
<td>25</td>
<td>Master’s Reading Endorsement</td>
</tr>
<tr>
<td>Lexi</td>
<td>4</td>
<td>5</td>
<td>16</td>
<td>Master’s</td>
</tr>
<tr>
<td>Julia</td>
<td>3</td>
<td>2</td>
<td>20</td>
<td>Bachelor’s</td>
</tr>
<tr>
<td>Rachel</td>
<td>5</td>
<td>7</td>
<td>22</td>
<td>Master’s Kindergarten, Math, Social Studies Endorsements</td>
</tr>
<tr>
<td>Tim</td>
<td>4</td>
<td>14</td>
<td>23</td>
<td>Bachelor’s</td>
</tr>
<tr>
<td>Melinda</td>
<td>3</td>
<td>4</td>
<td>11</td>
<td>Bachelor’s Language Arts minor, Computer Science certificate</td>
</tr>
</tbody>
</table>
Data Collection and Analysis

In IPA research, the goal is to access the lived experiences of participants. This is best accomplished through in-depth first-person interviews, which create space for participants to share rich, detailed descriptions of their experiences (Smith, 2011; Smith et al., 2009). Such one-on-one interviews allow a researcher to develop rapport with the participants and create an atmosphere of personal discussion that elicits reflection and deeper sharing. This study employed a semi-structured interview protocol, whereby the researcher could modify initial questions and follow up as necessary based on participants’ responses. This approach provided a detailed and in-depth view of how participants understood and experienced the implementation of the scripted writing curriculum at their school. Miles, Huberman, and Saldaña (2014) suggested that selectivity is vital lest the researcher become overwhelmed with extraneous data that prevents proper analysis.

Participant interviews were audio recorded to allow for transcription and analysis. IPA requires a “close, line-by-line analysis of the experiential claims, concerns, and understandings of each participant” (Smith et al., 2009, p.79). Although a professional transcription service was employed to render transcripts of the interviews, due to the iterative and inductive nature of IPA analysis, the researcher relied on both the recorded and transcribed interviews during the analysis phase.

Larkin, Watts, and Clifton (2006) proposed two specific phases for data analysis within IPA. The first phase requires a co-construction between participants and researcher to create a detailed and “psychologically informed” description of the participants’ world (Larkin et al., 2006, p. 104). The second phase involves an interpretative analysis in which a researcher attempts to situate this description within wider societal and theoretical contexts in order to
discuss what it means for participants to have expressed certain reactions and feelings regarding their particular experience.

Stake (1995) insisted that analysis should not be “seen as separate from everlasting efforts to make sense of things” (p. 72). To that end, Stake proposed two ways to find meaning during those everlasting efforts: direct interpretation of an individual instance and categorical aggregation of instances. In the first approach, the researcher must examine an instance and ask “What does that mean?” Creswell (2013) described this direct interpretation as the “process of pulling apart data and putting them back together in more meaningful ways” (p. 199). In categorical aggregation, a researcher studies the aggregate of instances looking for patterns that might illustrate meaning. Once a researcher has discovered and exposed meaning within the case, the next step is to develop naturalistic generalizations, which allow readers to learn from the case through their own experiential insights (Creswell, 2013; Stake, 1995).

Some researchers have cautioned that over-analysis of participants’ stories can strip the meaning from the stories, leaving them empty vessels that can then be used to communicate whichever meaning a researcher desires (Conle, 2000; Hendry, 2007). If a researcher is to remain open to fully hearing the stories of the participants, it is important not to jump too quickly into decisions about interpretation or coding (Saldaña, 2013). Smith et al. (2009) described a process of transcript analysis comprised of a series of steps that include initial descriptive, conceptual, and linguistic coding; the development of emergent themes; and interpretation. Saldaña (2013) suggested that certain types of coding structures are better aligned with certain research stances. With that in mind, the current study explored the lived experiences of teachers who implemented a district-mandated implementation of a scripted curriculum. As such, coding processes that
reveal personal meanings, such as in vivo, emotion, and process coding, were best suited to this study.

**Trustworthiness and Verification**

Hendry (2007) expressed concern that a narrative researcher’s analysis may become “a mode for saying what we want to say and not really listening to what is being said” (p. 493). There is definite risk of falling into that trap with interpretative phenomenological analysis, where the researcher is attempting to capture the experience of an individual. To protect against such bias, this study employed rich, thick description. IPA requires a researcher to include enough description of participants’ responses to allow the reader to understand the participants’ experiences and the researcher’s analysis (Larkin, Watts, Clifton, 2006). Creswell (2013) also suggested that such detailed description is necessary to help identify other contexts to which the study may be generalized.

Furthermore, to separate perceptions of the world from what is taken for granted about the world, phenomenology requires a process referred to as *bracketing*. When one seeks to bracket an experience, the desired effect is to establish what is “at the core of the subjective experience” by stripping away misconceptions and assumptions about the experience (Smith et al., 2009, p. 14). Bracketing was used in this study as a way to identify possible preconceptions and prevent them from influencing the results of the study.

The validity of qualitative studies may be assessed using four principles set forth by Yardley (2017): sensitivity to context, commitment and rigor, transparency and coherence, and impact and importance. This study addressed Yardley’s first principle, sensitivity to context, throughout all phases of data collection and analysis. In order to assure sensitivity to context, the researcher sought a thorough understanding of the existing literature on the topic and became
familiar with the school setting of the participants through sustained engagement with both the participants and the gatekeepers (who in this case were the school principal and the district director of curriculum). Sensitivity to context was also important during the analysis phase of the study (Smith et al., 2009; Yardley, 2017). To maintain sensitivity during the analysis phase, the researcher worked to be sensitive to the meanings generated by the participants and carefully considered how phrasing and context contributed to meaning making. This was further accomplished through member checking and debriefing, whereby the participants were invited to review the analysis and provide further insight (Creswell, 2013). Member checking and debriefing also served to address concerns about appropriation. A preliminary analysis was shared with the participants and their feedback was used to correct any discrepancies between their statements and the researcher’s interpretation of those statements and to maintain the participants’ voice and agency.

The flexibility of IPA can be mistaken for a lack of rigor (Larkin et al., 2006). To ensure rigor and commitment, the current study employed in-depth engagement with the topic and detailed analysis (Yardley, 2017). These processes were most evident through the interview protocol and the use of extracts from the participants’ interviews to support the identified themes. To demonstrate sufficient rigor, IPA interviews must include sufficient probing to allow participants to fully explore their experiences and follow cues from the participants’ answers to explore the topic deeply (Smith et al., 2009). Transparency and coherence contribute to rigor by spelling out the data collection process and presenting the findings in a way that makes clear the reasons for selecting the identified themes. Smith et al. (2009) cautioned against ignoring ambiguities that emerge within an IPA study, suggesting that such contradictions contribute to a
richer understanding of the themes. The inclusion of contradictory evidence enhances the current study and is discussed in a manner that contributes to coherence and transparency.

Yardley’s fourth principle, impact and importance, refers to the need for research to generate useful information (Smith et al., 2009; Yardley, 2017). The current study contributed to what is known about how teachers enact curriculum within their classrooms, how they experience the enactment of new curriculum, and how it affects how they feel about themselves as teachers. Such information is relevant as educational stakeholders seek effective ways to enact change within their school districts.

To further ensure the validity of this study’s findings, an independent audit was conducted. In order to allow others to check the validity of a study, data should be filed in a way that creates an evidentiary chain (Creswell, 2013; Smith et al., 2009; Yin, 2009). The current study employed such an evidentiary chain, which was made available to an independent auditor. This auditor was an established researcher familiar with both IPA and the purpose of the current study. The auditor was given access to the data and analysis and asked to determine whether the study fulfilled Yin’s criteria of producing a credible account that was transparent and systematic (Smith et al., 2009).

Data Storage

The digital recordings of the interviews were stored on a secure computer and backed up to an external hard drive. The hard drive and all copies of the interview transcripts were kept in a secure locked cabinet in the researcher’s office.

Protection of Human Subjects

As noted in the data collection and storage sections above, steps were taken to protect the participants from negative consequences of the study. Prior to recruiting the potential
participants, permission was sought from the school district and school. Each site received a written statement of the study’s purpose and the intended use of the collected data. According to Smith et al. (2009), a guarantee that participants’ accounts will remain confidential requires that what they say in the interviews will not be shared. Confidentiality is therefore insufficient; instead, participants were guaranteed anonymity. The anonymity of each site and each participant was ensured through the use of generic labels (in this case, Oak Creek Elementary School) and pseudonyms. Each prospective participant was also provided with the purpose statement and the intended use of data, as well as a description of how anonymity would be maintained. Participants signed an informed consent form prior to their inclusion in the study.

Although there is risk whenever teachers open up their classrooms for professional scrutiny, harm to the participants was avoided by maintaining strict anonymity. The narrative was co-constructed with participants, as is common in narrative inquiry (Clandinin, 2006), and the researcher’s attempts to restory the narrative were shared with participants. Their feedback was used to correct any discrepancies between their statements and the researcher’s interpretation of those statements in order to maintain the participants’ voice and agency.

Participants were also notified in writing at the onset of the study, and reminded verbally during the initial set of interviews, that their participation was voluntary and that they could opt out at any time during data collection and prior to the start of data analysis with no adverse consequences. Since the focus of IPA is on the co-construction of meaning, participants were also given the opportunity to review the transcripts for accuracy and to withdraw particular comments if they wished.

In addition, approval was obtained from Northeastern University’s Institutional Review Board prior to beginning the study.
Summary

The current study explored the lived experiences of writing teachers as they implemented a district-wide adoption of a scripted writing curriculum. The primary research question asked: How did elementary teachers at Oak Creek Elementary School experience the required implementation of scripted writing materials in their classrooms? In order to fully explore that question, this researcher conducted an interpretative phenomenological analysis using semistructured interviews with teachers who had implemented the Lucy Calkins Units of Study writing curriculum. The goal of this research was to explore how these materials affected teachers’ feelings and beliefs about their own efficacy as teachers of writing and to provide insights for administrators who may be considering adopting a scripted writing curriculum.

IPA is especially suited to the purpose of providing insight, as it is first and foremost an interpretative process. This interpretation occurs as a researcher genuinely listens to the participants as they describe their experiences and analyzes those stories to “make sense of what is being said” (Smith et al., 2009, p. 35). Through such analysis the reader is then afforded an insider’s perspective of what it is like to have experienced the target phenomenon. In the case of this particular study, school administrators who are considering adopting a scripted program may gain insights necessary to better prepare and support teachers as they implement the adopted materials.
Chapter 4: Data Analysis

This study explored the lived experiences of writing teachers as they implemented the district-wide adoption of the Lucy Calkins Units of Study (UOS) scripted writing curriculum. Interpretative phenomenological analysis provided data for the in-depth analysis of each participant’s experiences during implementation of the UOS program. While participants all taught at the same school, a detailed description of their teaching backgrounds illustrates different experiences as teachers of writing and varied exposure to the UOS curriculum prior to this district’s implementation of the program.

This chapter begins with the participants’ stories. In order to provide a context for understanding the participant’s experiences while implementing the Units of Study program, it is necessary to first briefly discuss the district’s prior history with curricular adoptions and professional development. Once the context has been established, an introduction to each of the six participants and a brief description of his or her experience as a teacher of writing is provided. Following the introduction to the participants, the chapter explores themes that emerged across the interviews as answers to the research question. The chapter concludes with a summary of major research findings.

Situational Context with Regard to Curricular Adoptions

Oak Creek Elementary was one of eleven elementary schools in the River Basin School District. River Basin is ranked in the top 4% of Indiana public school districts and Oak Creek, with 100% of its teachers rated as effective or highly-effective, has been designated a Four Star School by the Indiana Department of Education. The district identified the strategic goal of having the highest quality faculty and staff supported through on-going, job-embedded professional development. The district prided itself on teacher involvement in curricular
decisions, noting on its website that teachers are involved in professional learning communities and collaborative planning.

District administrators described the curricular adoption model as a fairly robust process that involves teachers, administrators, parent groups, and the Board of Trustees. Teachers concurred with this description of the adoption process for content areas that include reading, math, social studies, and science. The area of writing instruction seemed to fall outside of this adoption protocol, due in part to the view that writing instruction was not a separate content area, but rather imbedded in other content areas. This view caused the district to focus on providing teachers with supportive materials and trainings, rather than a writing curriculum. Toward that end, the district supplied teachers with several resources over the last few years, including Writer’s Express, 6 + 1 Traits, and the Simple Six. As will be illustrated further in the following section, this cycle of reform initiatives contributed to teachers’ resistance to what they perceived to be yet another program.

**Narrative Background of Participants**

**Abby.** Abby summed up her philosophy about writing instruction by saying, “Writing is one of the most important parts of language arts because it’s thinking on paper and that’s where we really learn what our kids know.” Abby held a master’s degree in elementary education and a reading endorsement. A teacher for 25 years, Abby had taught every grade from first through eighth. When the Units of Study curriculum was first introduced to this school district, Abby had been teaching middle school language arts for several years. After two years using UOS, Abby transferred to a fifth-grade classroom at an elementary school. She stated that she requested the grade-level change partly due to the pressures of grading UOS at the middle school level: “So
much expectation, if you look across the subject areas, it wasn’t equitable. You just couldn’t do
it.” Of her new position as fifth-grade teacher, Abby said, “I only have 26 papers to read.”

Abby stated that before her district adopted the UOS curriculum, teachers “didn’t ever
have a [writing] curriculum.” Instructional decisions were made by “looking at the standards,”
and then teachers would “hodge-podge things together and implement something, come back
together, talk about how it went, try to refine it and continue on that, what worked well or try to
support the holes for the kids.” Abby felt writing “wasn’t a top priority” for the district: “Writing
was on the backburner. Do writing in everything else. Writing was mentioned but there was no
training or no push for it.” Although the district did train teachers to use Kay Davidson’s Simple
6 program, Abby said the directives came from higher administration without clear direction on
how to use it:

People above me also have this put into place to tell their teachers to do this. They’re not
given any guidance or any support either, so it’s just a long chain of we’re going to make
a change, but we’re not really going to support the change; you just do it and make sure
you do it in the same amount of time you’ve done everything else.

Despite the lack of a district-level writing curriculum, Abby stated that the main goal at
her school was:

To teach the kids how to write a solid paragraph with the topic sentence, details, and
conclusion and then we always had a push closer to ISTEP [Indiana Statewide Testing for
Educational Progress] when teaching the kids how to write a multi-paragraph piece.

Abby felt she supported student growth in writing, saying:

I was really good at helping children understand the format of writing a paragraph, and
that was what they lacked when they were coming in, and so once we would get that
under our belt it opened up other avenues. I tried to do a lot with writing essays to help them with the different formats, compare and contrast, or description, or whatever a prompt might ask of them.

When the district announced the adoption of the Lucy Calkins Units of Study curriculum, Abby said she and her fellow teachers were “angry because it was forced on” them. Abby said the district expected teachers to use UOS “with fidelity, to use the materials and implement the strategies” but that they did not provide the support teachers needed to do that. The district brought in a specialist to explain the program and model how to implement some of the strategies, but Abby felt this workshop did not address the real concerns of the teachers: “He would tell us to do something and say don’t worry about grading, but then we’re under the pressure of making sure we have a writing grade.” Abby felt that the teachers could have benefited from more time to talk about “how can we make this fit in,” but that the “administration doesn’t want us to take any time to talk like that.” There was already “this feeling of overcrowding the curriculum,” which Abby attributed to multiple assessments that she felt the corporation required “so that we would teach more isolated skills.” The UOS materials seemed to signify a shift where the “whole curriculum went from a language arts mixture to solid writing. So that meant everything was writing, all the grading was writing, so I felt like we should just call it a writing class, not language arts.”

Despite this initial resentment, Abby decided she “would take the Lucy Calkins material and I would use it to the best of my ability, studying it, implementing it, re-reading it, making sure that I’m understanding what I should be doing.” To fully understand the program, Abby felt she needed to focus on the underlying philosophy, which required “a lot of reading and studying and talking back and forth with myself and then my colleague.” Abby’s personal life suffered as
a result of this huge undertaking: “I couldn’t go to church, I couldn’t attend family gatherings. It took a lot of time.” Abby also noted a change in how she felt about her profession:

I’ve always loved teaching and I started to dislike it…. We often sat at the lunch table and said we would never, ever recommend anybody go into teaching. It’s very difficult now with all the testing, and the Lucy Calkins does not match up to the grading.

It was collaboration with a colleague that helped Abby regain her balance: “We pulled in ranks, we got tight, we talked a lot. We tried to be protective of one another.” The encouragement Abby received from her colleague helped her refocus on “the things that were really positive that were reasons that we went into teaching.” Without this colleague, Abby said she “would have really been miserable.”

As Abby implemented UOS in her classroom, she noticed changes in her students. At first “it was very difficult for the children because they didn’t have a foundation. They did their best to try to meet expectations, but we [were] actually operating in those gaps where they don’t know it.” The UOS program started with personal narrative writing, which Abby described as “so much fun because we got to know each other as people and we got to share if something happened at our family reunion, oh something happened at mine also. It just built a lot of collaboration.” Abby used the momentum from that first unit to introduce writing workshop as a collaborative venture:

I called kids up that had different needs, and I coached them and I kept coaching them until they became coaches and they were coaching one another. So, I could kind of scoot back and be the guide on the side while I watched them ask each other to comment about something that they heard in their friend’s paper.
This proved highly motivational for students who “felt very proud that they could have that information to share.”

Abby felt that she:

Learned a lot of strategies that would expand their writing and made their writing more interesting; they were tools that they could use. I always teach them, this is your writing toolbox, you know take this out for elaboration, take this out for dialogue or whatever so this really expanded our toolbox.

Another UOS strategy that Abby found helpful was the use of mentor texts. The sophisticated nature of the books used as mentor texts “help draw out kids’ thinking.” Overall, Abby felt the UOS curriculum had improved her teaching, and she was “grateful” to have the strategies because “the writing got so much more powerful. It was powerful writing, it wasn’t just a piece; they were invested in it.”

At the same time that Abby appreciated the benefits of the UOS curriculum, she was “mad at the way it was implemented and the expectations that are put on us.” One of Abby’s concerns was how students were affected by the manner of the implementation:

I was learning and I didn't have a handle on everything. I was experimenting and I don’t think that children should be put in the position where they’re in the experimental phase. We should all be taken out of that and, and actually be able to experiment without having to call it a final, done deal.

She felt that it was “horrible” to “give a grade even though [teachers] don’t even know what [they’re] doing” and resented the district for making teachers assign grades to student work that had been produced while the teachers were still figuring things out. Abby proposed that the district could have structured the implementation differently:
If we could have taught Lucy Calkins and had a year with no grades, it would have been a beautiful thing. If we would have had release time to talk, to talk together as groups to try to refine and figure out what we were doing, that would have been a huge help. If we could have had release time to say this is what’s happening, this is how the kids are reacting, this is what worked, this is how I tweaked this, it would have been so much more helpful.

Lexi. Lexi described her approach to writing as rooted in conferencing, saying, “Conferencing…was the easiest way to get my kids to improve their writing, and to get to know them just as a writer, as a person was just to talk to them about it.”

Lexi had 16 years of teaching experience, during which she taught exclusively at her current school in fourth and fifth grades. She held a master’s degree in elementary education and studied the connection between reading and writing as part of her master’s thesis. In describing her experiences as a writing teacher, Lexi cited extensive training through the National Writing Project’s summer institute, ongoing membership and professional development through the Hoosier Writing Project (the regional chapter of the National Writing Project), as well as professional development provided by her school district. The professional development focused on modeling processes, writing traits, assessments, prompt writing, and most recently the Lucy Calkins Units of Study curriculum. Lexi had been recognized by administrators and colleagues as a strong writing teacher and asked to model teaching strategies at her school as well as for wider audiences at district in-services.

When Lexi first started teaching at Oak Creek Elementary, the district had no formal writing curriculum, “It was just, you teach writing.” Lexi stated she and her colleagues looked to the state standards for guidance and linked writing to the reading curriculum whenever possible:
“I’ve always done explicit writing instruction, but not everyone did. Some teachers would just have students read the reading story and write about that.” Lexi described her approach to writing as a guided approach, in which she would “model and we would look at some of the good examples, they’d come up with their own ideas.” Lexi incorporated a lot of shared writing, which she described as times when the class would:

Talk about how to eat a cookie and give step-by-step examples and do one together. Then they would pick something that they know, and they would get to go in writer’s workshop style, actually be able to choose their topic.

Lexi said her early work with writer’s workshop was based on Ralph Fletcher’s craft lessons and incorporated a lot of mentor texts.

Lexi described her grade-level team as very collaborative. Her experiences with the National Writing Project and her enthusiasm for using writer’s notebooks led others to seek Lexi out as a model. Occasionally she and the other teachers combined classes so that Lexi could teach all three classes and the other teachers “could see how I teach my writing workshop, like how I would do my minilesson for the writer’s notebook, to get them doing different types of entries.”

When Oak Creek first started to consider the Units of Study curriculum, Lexi was a member of the school’s writing committee and so she “was not totally shocked” when the district adopted the program. Her team “had kind of looked at the preview units of study, like they had given us one of the samples books, so I knew that they were at least considering it.” Lexi’s initial thoughts about the curriculum were very positive, as the program seemed very similar to “kind of how I run my classroom.” Despite their attempts to involve teachers in the process, the district moved very quickly from consideration to adoption and Lexi felt teachers did not have input in
the final decision, “It was kind of like ‘Hey look, we got a new writing program, surprise.’”

Teachers did not have input in the timeline for implementation, either:

It was like okay, so we’ve adopted this new program and now the expectation is you follow this and that you do it at a minimum four days a week for at least 40, I think it was either 40 minutes or 45 minutes, something like that, and this is what you’re using to teach writing.

The effect of the new curriculum on Lexi was drastic. Writing had been Lexi’s favorite thing to teach because:

I felt that I made a big impact on them when we did writing. I felt like more kids enjoyed writing, even my reluctant writers were like, well, fine I guess I’ll write something as opposed to no, I hate writing, I’m not going to do it. I think I at least convinced them that they should pretend to like it because they knew I loved it so much.

With the district’s insistence on adhering to the UOS curriculum to the exclusion of previously used materials, Lexi felt as if “someone took my baby away from me.” Whereas she previously enjoyed spending her planning time “pulling things myself,” the prescribed curriculum took away that joy:

Never in my life have I dreaded teaching writing and… that’s the first time that I ever thought oh, I’ve got to read my lesson for tomorrow because I just felt like it was not my plan and that I had to look carefully at making sure I got all her parts in and there was so much jammed packed into every day of writing workshop that it was, I felt stressed for the first time in a long time when it came to teaching writing.
Lexi felt that stress transferred to her students as well: “I don’t think my kids had the same feeling about writing leaving my classroom like they did before that where more kids were more excited about writing and I don’t think I got that out of that group.”

Lexi attributed part of the change in her classroom climate to lack of advanced preparation and the complexity of the materials: “We didn’t really get much information prior to the units about how exactly they were laid out…. I think maybe the only training that we got before it was like, ‘Okay, go.’” The materials themselves were “not really user friendly because it’s this big long paragraph for everything… and the teaching point is pages later.” The failure to provide a grounding in the UOS curriculum and the narrative nature of the lessons translated into Lexi spending much more time planning for writing instruction:

I would try to read for the week to see okay where am I going, what are my lessons, but it would take a couple hours to read through things…. I had to read it and then go back and annotate it so that, since it wasn’t my lesson, so I’d have to go back and highlight the key words so that when I’m glancing down I would remember what I was supposed to say next…. I felt myself looking at my manual more than I had ever done before.

Lexi and some of her fellow teachers approached the district administration about the cumbersome nature of the materials and offered to “kind of streamline the format” by “taking out some of the long narrative parts and just make an outline of the lesson.” Lexi stated that the intention was to make the materials easier to use while teaching. According to Lexi, administrators were concerned that such an outline would cause teachers to “skip reading the manual and just read that,” so that teachers would not be “actually doing what the lesson intended or understanding how to share some of those examples.” Lexi acknowledged that “there’s probably some people who wouldn’t read all of it, but I would have read it. Or at least as
much of it as I needed to read to feel like I really knew what I was talking about.” Lexi wondered whether the people who would not read the materials might also be the same people who “are not really going to try it anyway.” Her offer to provide materials that were “a little bit easier for [teachers] with an outline format” was intended to encourage those teachers to “at least try to do the quick minilesson with the basic minilesson on the page, as opposed to just saying eh, maybe I’ll save writing for tomorrow and just shelve it.”

The pressure to follow the UOS curriculum caused stress for Lexi because she felt there was “a disconnect” between the curriculum and her students’ needs: “Sometimes I was not really sure that this is the best order. [Students] need to move on before they lose all interest whatsoever.” Student engagement was also degraded: “It was hard for [students] to step back and not contribute when they’re used to contributing.” Lexi also worried about administrators “policing everyone” and that someone might “see that in my plan book I never wrote Lesson 14 in there, and that they’re going to say, but you said that Lucy’s a good program and that you’re teaching it but how come you didn’t?” More recently, Lexi felt she had “been able to find a balance” in her teaching that allowed her to address the UOS materials and “still squeeze these writing activities in with our reading program and our other activities.” Lexi had also released herself from the district’s expectation that students write for a specified length of time every day: “They do need time to write but, okay so maybe it was 20 minutes today, it’s not the end of the world.”

Julia. Julia described her approach to writing instruction by stating, “As a teacher I need to help students to realize the importance of writing and being confident in their writing, and take risks with their writing, it just connects to so many different aspects of their life.”
Julia held a bachelor’s degree in elementary education and had been teaching for 20 years. Eleven of those years were in another state, where she received training in the use of scoring rubrics and aligning writing assessments to state standards. Once she relocated to Indiana, Julia received training in writing traits and most recently in the Lucy Calkins Units of Study curriculum. During her time in the classroom, Julia taught every grade from kindergarten through fifth. This was her fourth year at her current school and her second year teaching third grade.

Prior to joining the staff at Oak Creek Elementary, Julia taught in another district that did not have a formal writing curriculum. Writing instruction was based on the state standards and teachers were expected to “gather curriculum from trainings that we attended, either that the district provided for us or that we sought out on own.” Julia found collaboration to be important and felt part of a “professional teaching team” that shared “resources that we have found on our own or that we have used in the past.” Despite this supportive environment, Julia said that teaching writing was her “weakest area.” She found it:

- Hard to meet the needs and differentiate instruction for all of them” because “some of them … love writing and they write and write and write and write and write, and other ones, they can't even think of a topic to write about.

In addition, Julia struggled to:

- Prioritize all the grammar aspects of writing, all the language arts, the parts of speech, the complete sentences, the sentence variety, the punctuation. There’s so many elements of writing that is just so hard to… Do you focus just on the grammar? But then that could take you all year [laugh], and while they're doing just grammar you don't want to do just grammar in isolation. So you know it was just finding that blend.
Julia tailored her instruction to help students “understand the application of writing outside of school.” She taught students the steps of the writing process and would start out the year by going through each of the steps, “what it was, what it looked like, why it was important.” Julia wanted her students to see “real life examples of how people in the real world use the different steps of the writing process” so that the students would “see value in it.”

When Julia came to Oak Creek, the school was already in the second year of implementing the Units of Study curriculum. During her first year at Oak Creek, Julia taught fourth grade before switching to third grade and had been teaching third grade for two years. The fact that Oak Creek had a writing curriculum was attractive to Julia, “I was like oh, there’s a writing curriculum, there's a set program that I'm going to be following and it's going to make sense.” Julia said the principal “was very excited about [the UOS curriculum] and she was very positive and upbeat about it” and this enthusiasm made Julia believe “this is gonna be good, it's going to help make things better.” Making sense of the materials proved more difficult than Julia expected because “the teaching manuals that we are using to implement this curriculum are not teaching manuals. It is not written in a way that is user friendly.”

As a first-year teacher in the district, Julia received the UOS materials along with her other subject area teaching manuals. She found she had to “really read the lessons carefully” because “it's just not written in an easy format for teachers to use.” Julia “went through the first couple lessons and made notes and post-its and started using it.” The district held professional development for teachers new to the district and Julia attended such a training a few weeks after the school year had started. Julia said that at the training “one of the directors of the elementary [program] had us pull out, in addition to the expository manual and the narrative writing she also has all these like background books that come with your set.” Julia said the elementary
curriculum director showed the teachers how “to mark all the chapters with Post-it notes in the background knowledge book” and then had the teachers “pull out the reasons Lucy Calkins is effective and we marked those chapters.” At the end of the meeting, the curriculum director informed the teachers that they “really need to read this before you start teaching.” Julia felt that the training came too late:

We're already at week one or two of school. I should've already been teaching and I'm up to my eyeballs. I don't have time to read two extra books right now when I'm just trying to read through a 10-page lesson before I teach it the next day and you’re supposed to do at least four a week and don't forget your reading instruction, and your math instruction, and your science and social studies instruction, and your handwriting instruction, and your vocabulary and word-master.

When Julia returned to her classroom, she felt “overwhelmed implementing [UOS] and I felt that I was inadequately implementing the curriculum.” She began to “always question myself. Am I doing this right? Is this really the way it should be?” Julia stated that questioning her efficacy made her “much more hesitant with my writing instruction” and “transferred over to [students] being more hesitant with their writing.” The constant self-doubt and the amount of preparation required caused Julia to pull away from the required curriculum,

To be completely honest as the year went on, I still taught writing, but I didn't follow the Lucy Calkins lessons, because you just, I mean things get so busy with the holidays and just testing and testing and you just don't have time.

Julia came back to the UOS materials the following year with renewed commitment because she had:
Trust that the people above me who make the adoption decisions and who have the time
to go through and make sure that things are correlated appropriately, they're going to
make the best decision possible so that I can have the tools I need to let my kids be at the
level they need to.

Julia sought out support from other teachers in her building by looking to see “which kids are
getting much better writing instruction from which teacher and which ones are stronger in
writing” and asking those teachers to “help me so I can get my kids to where yours are.” Julia
said that support, coupled with increased familiarity with the materials, helped her “understand
the scope and sequence better of the lessons, so I understand why we’re taking the steps to get to
that overall ending point for the units.” To effectively use the UOS curriculum, Julia stated she
also had to become “familiar and confident with the state standards and with what’s expected on
the state test.” Her “experience with those three elements” helped her to “take the Lucy Calkins
and blend it in and use those strategies and use those processes to help [students] meet the
expectations for the state test.”

Although Julia was able to persevere and get to a place where she felt her impact on
student writing was “about the same, maybe a little bit higher” than it was prior to adopting the
UOS curriculum, Julia felt the district could have eased that process. She said the district could
have helped by “bringing new teachers together” and being available to answer questions while
teachers worked collaboratively to “familiarize [themselves] with [their] curriculum, to
familiarize [themselves] with [their] standards.”

Julia also worried about the ability of one writing program to address the “individuality
and uniqueness of every child in every classroom” and the tendency of districts to mandate
implementation schedules. She stated that she “likes the idea of a writing curriculum [but] this
curriculum is too specific and rigid.” A major concern for Julia was the difference between what districts say they want and what they structure time for. She described this as “a great hypocrisy in education,” noting further:

All the time we hear differentiation, differentiation, differentiation. Differentiation isn’t just, you do seven problems and I do 10-problems, differentiation is also the speed, differentiation is also processing, differentiation is maturity levels, differentiation is manipulatives. You can't be stuck to a calendar that you have to follow and still truly differentiate to meet the needs of your kids.

Julia stated that “in order to really make it authentic for my kids” she had to modify what she taught:

If my kids are not writing complete sentences, we're going to take some time we're gonna learn how to write complete sentences. I'm sorry if that's not the exact lesson of Lucy Calkins, but they need to be able to speak and write in complete sentences for everything they do in life. It’s something they have to do and it would be a disservice to them if I didn't make sure they could do that.

Despite these concerns, Julia saw definite benefits in using the UOS curriculum: “It also does give you a path to follow, and there is reassurance in having that path.” Julia qualified her optimism regarding the curriculum’s impact on her teaching efficacy:

I think as I use it more and become more familiar with it, I think that it is helping me to be more effective, but also as I’m using it and becoming more familiar with it, I’m also tweaking it to what I need it to be much more.
Rachel. Rachel discussed writing as an emotional journey for students, saying, “Writing is such a process—step by step, little by little. No matter the program, writing can be frustrating if they’re not willing to put forth the effort and really try to write something.”

Rachel held a master’s degree in elementary education and endorsements in early childhood, 5-8 science, and 5-8 math. She had taught for 22 years, with 13 of those being at the middle school level. For the last seven years Rachel had been teaching fifth grade at Oak Creek. Rachel served on the writing committee at her school and estimated that she had attended over 20 workshops on writing, including trainings in writing traits, prompt writing, assessments, and the Lucy Calkins Units of Study curriculum.

When Rachel came to Oak Creek, she said she received “no guidance” on how to teach writing, but that she “had taught writing for long enough at the middle school that I just came with my own toolbox.” Rachel said this toolbox included being able to use the “6+1 writing rubric and focus on different areas of writing, [including] a persuasive essay, an opinion essay, a research essay, a narrative essay, an expository essay, and how-to essay.” Prior to the introduction of UOS, Rachel focused instruction on ensuring students “could write paragraphs, structured paragraphs, paragraphs that made sense, and then they could build upon it.” She stated that she “didn't focus too much on narrative writing, like personal narratives because adult writing, rarely do you actually just write narratives about yourself.” Instead Rachel saw “real writing for the students” as “writing answers to essay questions and being able to write like a reader does.” She felt this approach was effective with students:

Once we mastered the structure of a paragraph, I didn't have to waste time still on the basics and we could move ahead to do the additional things in writing to make them better writers. Was everybody there? No. Did everyone get there? No, but I felt like the
majority of the class, I could really tell a difference from their first piece of writing at the beginning of the year to the end.

The district introduced the Units of Study curriculum during Rachel’s third year of teaching fifth grade at Oak Creek. Rachel stated the decision “just didn't seem like the typical adoption, where you had a committee of teachers who looked at various programs and chose a program…. It was more chosen for us, told this is what we are using.” Rachel said the program was introduced to teachers “at the end of the year and I believe we got all of our materials right before summer.” Rachel found it to be “overwhelming reading, very detailed, which is great because it helps you understand but, very detailed, very time-consuming to read and prepare for.” While Rachel acknowledged that she needed time to prepare so she could teach it on “day one in the fall” she felt that “summer is my time and so expecting me to read, plan, and be prepared to do this without too much training was difficult.”

Rachel said during the first year of implementing the UOS curriculum “the climate went downhill, everyone felt overwhelmed, confused, frustrated.” While her grade-level peers were willing to collaborate, they were new to the school and did not provide much support for Rachel. The teacher turnover in each successive year left Rachel feeling as if she was “on my own island a little bit.”

Rachel stated, “Right away we kind of knew there would be a problem with the time constraints that were required” to teach the materials for the mandated “four days a week, for 40 minutes minimum… when you're also told that you have to do X amount of time on reading every day, and X amount of time on math every day.” Furthermore, the UOS materials did not seem to work within the time slots the district suggested:
There are a few lessons that there's no way you could do the whole lesson just as, in 40 minutes, and if you wanted to do it justice, and get the kids to truly understand all the different parts within the lesson, one lesson could be two or three days, which is great except then Unit 1 went months.

Rachel suggested that the resulting extension of the unit caused students to “kind of disengage or miss the point.”

Rachel said she was “feeling pulled in every direction” because of contradictory mandates from the district, which instructed teachers “not to do the basal writing, only do Lucy writing” but then “hearing well you need to do some of the basal writing because that's response to literature and that’s huge on ISTEP.” Further, Rachel felt pressure to “do prompt writing, which is a huge part of teaching writing and again when you do prompt writing that goes back to structure of ideas and paragraphing and planning.” Rachel was frustrated by the requirement to meet those needs when “Lucy [Calkins] doesn't include those types of things in her script.” The strain to cover all of the skills students needed left Rachel feeling like a rubber band, “and you know, you pull a rubber band long enough, a rubber band just breaks.” Rachel stated that although she understood the district’s mandate to teach the UOS materials, “fitting 40 minutes four days a week” in her classroom “doesn’t happen.” She elaborated:

Realistically sometimes it’s three days a week, sometimes it’s two days a week and some days there might not have been any actual Lucy writing the whole week and not because we didn’t try, it’s because we don’t have time.

Rachel found it “challenging at first to quite understand what I was supposed to get the students to understand.” Rachel attributed part of that confusion to the spiral nature of the program, and “I’m just not sure that it’s an easy spiral to catch. It’s not as clear cut what skill in
writing should be mastered at a certain grade level, and introduced at another grade level.” In an effort to understand the curriculum well enough to effectively teach, Rachel spent hours studying and restudying the material:

What I kind of learned to do was try to do a first read. If I knew I would do four lessons for the week, I would read all four lessons and kind of highlight. Then nightly I would say, okay so now tomorrow’s Lesson 12. I would re-read Lesson 12, kind of take my notes and then prep my notes or writing or chart or whatever it might have been that I wanted to share with the students. So, every lesson was really 45 minutes twice. Like it would be reading it once through and then reading it for purpose the second time and knowing okay, how am I going to get this across to the students, and sometimes it was even what [sigh] what does she want me to do?

Rachel felt that the district’s directive “to follow the lessons, lesson by lesson and do what it says and not… to supplement or do anything beyond what is in the book” was not sustainable because “if they want my buy-in on the program I have to make it fit me.” Rachel found some of the materials:

Very helpful to guide my instruction. [Calkins] definitely gives a step-by-step, this is what you can say to kids, this is what you can model for kids, this is how to encourage kids… but it didn't always fit my class.

Rachel spent a lot of her planning time personalizing the lessons:

When [Calkins is] talking about her dog that died, I'd never had a dog so, I could use it, but I knew that it wasn't heartfelt. So, if my heart isn't into it, I felt like the kids would kind of know because I'm usually passionate about writing. So, it's hard to be passionate about somebody else's ideas if you don't really know what they mean.
Rachel felt she was still implementing the lessons with fidelity because “even though I might stray from her words I don't stray from the presented curriculum.”

In retrospect, Rachel said she “was a better writing teacher prior to the program.” She attributed the drop in her efficacy to the manner of the implementation and having her “hands tied” when it came to using strategies that she found effective in the past. Rachel felt the simultaneous implementation of the program at all grade levels handicapped upper grade students, commenting, “I think we were expecting too much, too soon.” The materials assumed prerequisite skills that Rachel’s students did not possess that first year: “Some of these things were like sixth, seventh grade, and I understand the stretch but I feel like we might all needed to have started in third grade because that's just where our kids were at that time.”

During the first year using UOS, Rachel noticed a negative effect on her students. The difficulty of the material, paired with the scripted nature of the lessons, did not allow time to involve students in “just fun, creative writing” and seemed to negatively affect students:

I had many kids not like writing, they didn't want to write, they would just sit there, they need to go to the bathroom, they’d write for five minutes, I'm done. They didn't have writing stamina and then again when you're kind of being scripted with what you have to write, it's hard to get kids to want to have the stamina to write something if they dislike writing to begin with.

Rachel went on to suggest that the nature of the assessment materials included in the UOS curriculum may be partly to blame for lack of student growth:

Now students are to use the rubrics to set their goals, which is not a bad thing but they don't know. They'll say “I need capital letters, I need paragraphs,” well yes, but how about the actual content of the writing? So I think they have a harder time knowing what
Rachel also found she had “a harder time knowing what to tell them to work on because they need to work on everything.”

Although Rachel said she had seen student attitudes “improve over the course of the past few years,” so that when she announced the end of writing time each day she “actually hears groans instead of hoorahs,” she stated the students were not showing the “growth in writing that I used to see… from the first draft to the last draft now, there just isn't a whole lot of difference.”

Tim. Tim described storytelling as germane to his writing instruction, stating, “I mix in that are really memorable and that makes it fun. The more personable you make it the easier it is for the students to write.”

Tim held a bachelor’s degree in elementary education and had taught at his current school for 23 years. During that time, he worked exclusively in third through fifth grade. He had taught fourth grade for the last 14 years. Tim stated he had always “struggled with writing” and attributed that difficulty to a lack of focus on writing throughout his own education. The undergraduate program that Tim attended included “different classes where you had to write, but not a class on writing.” Tim suspected that his college assumed his high school had already provided a foundation in writing, but in reality he “wasn't taught writing at all.” As a result, Tim started his teaching career with “a big gap.”

When Tim was first hired at Oak Creek Elementary, he found his colleagues to be “really understanding” in the way they mentored him through teaching writing: “They were like well, this is how you would work through it, and it's laid out, and you choose what you want to do.” The approached used by his colleagues incorporated “lots of worksheets,” adding:
There were teachers I worked with that would copy for the next month and have just, this is the stack for this time, this is the stack. Everything was all scheduled and all copied and you just hand out the sheets and sit at your desk and if they need help they put their hand up.

Tim described a mismatch between that approach and his teaching style, “There wasn’t a lot of interaction. I’m an interaction kind of person so that was hard for me.”

Prior to the adoption of the Lucy Calkins Units of Study curriculum, Tim felt there was a lack of instructional leadership in the district with regard to how to teach writing. He described writing instruction as “fragmented” and reflecting “whatever the trend was,” elaborating:

They would start things but they would never finish it. They would recommend we start things and we’d get together and we’d do a committee and do this and then it never seemed to come to any kind of an end. It would be then the next year and then oh, and we’re going to do this.

Tim said teachers fell into two camps with writing instruction: “Some teachers really liked it and some teachers avoided it like the plague.” There did seem to be a push from the district to focus on the types of writing students were expected to produce on standardized tests: “We knew there were certain things that needed to be taught—writing to a prompt. ISTEP’s coming up, you need to get this prompt writing so they know how to write to a prompt.” Tim described that approach as “just you show samples or write at the prompt, read it, score it, you know let them know where they can improve, show them a rubric and give them another prompt.” This method also did not fit Tim’s teaching preference, “There wasn’t a lot of, I feel like it should have been more interactive.”
Eventually the district started to explore more formal approaches to writing instruction. Tim found some of the approaches advocated by the district to be helpful. The “whole Kay Davidson’s material came out,” which focused on writing traits and student-friendly scoring rubrics, as well as Writer’s Express, which focused on “different forms of writing.” Tim said to use Writer’s Express “you taught the form. So the kids would look at different forms of that writing and then we would look at key phrases to write in that style and then we would practice writing in that style.” While the district did provide some training in each new approach, Tim found the trainings to be inadequate for building his confidence with those approaches and stated he still “second-guessed” himself a lot. He questioned “Is this persuasive or is it? Even my grammar was… even dailies in the morning, it was like, is this right? I just didn’t feel like that was my strength. I had to learn it on my own.” For Tim, learning it on his own meant he adapted his teaching style and:

Just kind of went with it and felt like as I taught along it got better, my teaching got better. I think with the writing, my writing got better too, my own writing as a person I think got better.

This adaptation helped Tim finally find a way to integrate his own teaching style into writing instruction:

I do a lot of storytelling when I write, a lot of stories from when I was younger, just a lot of things I mix in that are really memorable to them and that makes it fun. They come back from you know other grades and they still remember the story of this or the story of that and you know that’s kind of funny, or stories we’ve written together, or I’ll take a funny situation that really happened to me and then change the characters, you know,
make it into realistic fiction. So it’s more personable. The more personable you make it
the easier it is for the students to write.

Tim found out about the district’s adoption of the Lucy Calkins Units of Study when “we
were given the materials, that’s how I saw it.” He stated that teachers were “given the materials
and this is what you need to do and this is our new writing and you need to spend at least 50
minutes a day in Lucy Calkins writing.” Tim said he’s been “around long enough you start to see
all these crazy trends where you’re just like… you start to get this and then they want you to do
this.” While the district provided funding for a few teachers to attend a training with Lucy
Calkins, Tim “didn’t have any training…. It was mostly, I opened the book and just started
trying to figure out how to do it.”

In some ways, Tim felt the UOS approach was a good match for his teaching style: “I do
a lot of storytelling when I write, almost like the Lucy Calkins narrative.” Despite the
commonality of their approaches, Tim said implementing UOS was “hard for me because I don’t
feel comfortable reading someone else’s narratives” and “in the very beginning, I don't think I
was effective at all” because “it just really didn't relate to my students at all.” He said that in
order to be effective, narratives have to “relate to the students a little bit better” than the UOS
materials, “So I was trying to, and I still am, trying to supplement my narratives to fit what her
narratives were.” Adapting the narratives was a time-consuming process for Tim: “I worked with
it a lot. I had a lot of Post-It notes, and I’ve written in my books a lot.” He found these
modifications increased student interest and his own sense of efficacy: “Once we were using my
narratives I became more effective. I felt like the writing was way more effective, the way I was
teaching was more effective. I felt like her processes were good.”
Although Tim believed his ability to teach writing had improved, he still had a lot of self-doubt as to whether he was implementing UOS correctly. This doubt led to avoidance:

I struggled. I mean I felt like, as busy as I was and all the things I was trying to do and all the subjects I was trying to do, I felt like it [teaching writing] was something that I would avoid if it came down to a time thing, I would avoid that first.

Tim said he used to write every day with his students, but during the initial attempts to implement the UOS curriculum the time he devoted to writing instruction dropped to “two hours a week” and, even four years into the implementation, “honestly it's the first thing that I avoid because it's my biggest weakness. We do other things and we’ve never gotten through all of it.”

Tim felt that training and collaboration would have “made it a lot easier in the beginning, because this is basically for me it has been self-taught.” Tim stated he would like to observe other teachers using the materials to see whether “they’re adapting the narratives or not, is that okay that I was adapting, I didn’t know, and I still, don’t know. I feel like it’s more effective when I have my own stories in there but, I don’t know.” Other than the mandate to “spend at least 50 minutes a day in Lucy Calkins writing,” Tim didn’t feel like there was clear guidance from the district:

I need to be told do this, do this, do this, do this. That's how I want to be directed and then I adapt as I go and make it better but, the way it was given to the teachers at least in our building was this is it, this is what needs to be taught and that's it. So, there were things that we found two years after teaching at on a CD of this that would've been nice to know how to use all that stuff at the beginning.

An idea of scope and sequence would also have been helpful to Tim, “Where is it supposed to go from year to year? What were my students learning in third grade in Lucy that I’m supposed to
build on in fourth grade? I don’t even know.” A deeper understanding of the program’s “end-game” would also have helped alleviate Tim’s “biggest fear”: that his students “get to fifth grade and start doing something in fifth grade with Lucy and then, well we never had that in Mr. [Tim’s] class. I don’t want to be a disservice to my students at all.”

**Melinda.** Melinda describes her approach to writing instruction in terms of outcomes:

“At the end of the day my goal is to make these kids better writers; you should be a better writer than you were yesterday.”

Melinda held a bachelor’s degree in elementary education and a certificate in computer science. She had been teaching for 11 years, with five of those being in first grade. At the time of this study, she was teaching third grade and had been in this grade level at her current school for four years. Melinda described her undergraduate preparation as a blend of whole language and phonics, which instilled in her a philosophy of language arts as the integration of reading and writing.

During the initial five years of her career, Melinda taught first grade in a school where the grade-level teachers collaborated to plan thematic units. She described her first year as a time when she “felt underwater a lot” and attributed that feeling to being underprepared. Her coursework seemed to focus on developing units and building a conceptual understanding of writing assessment, but Melinda felt that it lacked an “explicit let me show you how a writer’s workshop would work, let me show you how you should get kids encouraged to write, let me show you some strategies to use to help evaluate kids’ writing.” At that point, Melinda and her first grade team taught writing as two distinct activities, “a lot of, build words with letters, phonics and not necessarily anything to do with written language,” and projects, such as “cute penguins that hung in the hallway, with poems that went with them or learning about sunflowers
and drawing a picture of a sunflower and labeling it and telling why we liked sunflowers.”

Reflecting back on that time, Melinda recognized that the teachers’ focus on “getting something pretty to put in the hallway” encouraged students to view writing as “just a task that they were completing at school.”

Melinda stated that she never doubted her efficacy during her time as a first-grade teacher, but looking back later she felt she was “definitely not” an effective teacher: “I think we kind of got that false sense of we’re doing a really good job because the halls look pretty and parents are happy because they got little things to take home.” The retrospective change in how she viewed her efficacy during those first few years seemed to be the result of a conceptual shift in her understanding of the purpose of writing due in part to her experiences with the Lucy Calkins Units of Study curriculum. Melinda’s school began to explore UOS during her second year in that district. A pivotal moment in how Melinda thought about writing instruction occurred during that initial exposure, when the team viewed a video demonstration of Lucy Calkins conducting a writing conference with a first-grade student: “Here is this amazing lady getting this first grader to talk and tell her things that I didn’t think my kids could do.” While Melinda found the “manuals very overwhelming,” her school opted to phase in the program slowly, allowing teachers time to get acquainted with the materials prior to implementing them:

We watched some of the teachers who piloted it, as they taught it, and then we did some things after school where the teachers went through the manuals and kind of pinpointed some items… and our goal was just to get one unit done that year.

As the team implemented the UOS materials, Melinda found fundamental differences in how teachers engaged with students in the writing process: “The pre-writing phases were very much different to what we had done before” and the focus shifted from projects to hang in the hallway
to “giving students the responsibility for the writing…. The point of it is they are growing as a student who is a writer.”

Despite the school’s efforts to slowly phase in the UOS curriculum, Melinda stated that she still felt “very scared and nervous that I’ll—my gosh—have to read all the stuff every night and do it just like she did. How am I going to memorize all of these things?” In retrospect, Melinda acknowledged that the pressure that the manual had to be “followed to the T” was assumed by the teachers and not the result of administrative directives, yet at the time that pressure caused her to “take home that book and read probably at least an hour and a half.” She described a process by which she would take it home every night and “read the whole unit once, or the lesson and then I’d go back and star things and highlight things.” In the second year of the school’s implementation, several teachers were selected to attend a training given by Lucy Calkins. Melinda pinpointed that training as being the key to reducing some of her anxiety: “It wasn’t until then that I was like oh, she’s not saying that I have to say everything that she’s saying… and it made a lot more sense as to how I could kind of make it mine.”

The understanding that she did not have to implement the program word-for-word seemed to have helped Melinda. As she regained ownership of her writing instruction, she was able to bring back some of what she knew about good teaching:

My strengths were getting them excited about the topic and modeling to them. When I was an undergraduate, there was a very big focus on storytelling and I felt like I was good at giving them my story and giving them ideas to write about.

Melinda used her storytelling skills and her own writing to model ownership of the writing process, “My kids know that I write, my kids asked to read my writing notebook…. I’m a teacher. If they’re going to do it I need to do it too.” Melinda said she gradually came to realize
that ownership had to transfer into the writing conference too. Whereas during her first attempts at conferencing, she “pretty much ran the entire conference and I don’t even know if a kid said more than five words at the conference,” Melinda’s understanding shifted from thinking of conferences as “teacher swoops in, helps them fix all the mistakes” to a student-led conference. Melinda’s role in the conferences also shifted significantly:

I am there to write notes so that I can make minilessons or make sure that they have the tools they need to be successful, but when I conference with the student the very first question I ask him is “How can I help you as a writer today?” and it is totally in their court. I think having them acknowledge what they think they need help with is so powerful.

Melinda moved to Indiana and joined the staff of Oak Creek Elementary just as that school adopted the UOS curriculum. Although new to the district, Melinda felt she was in a position where she could serve as a mentor to colleagues who “were at the same starting point I was when I first got Lucy.” Right away she noticed the same patterns of teachers feeling overwhelmed:

I think that Lucy is intimidating and I think that people kind of hid a little bit because they were trying to figure this out and I think there’s an element of, I thought I was a good writing teacher and maybe I’m not and I am a little embarrassed.

In meeting with her colleagues, Melinda learned that many of them were so overwhelmed with trying to cover all the information in each lesson that there was little time for students to actually write. Melinda paraphrased their laments, “I would sit in the middle and do this minilesson and 45 minutes later writing is over and we didn’t get to write and I just talked to them.” Melinda encouraged other teachers to observe her minilessons and conferences so they could observe her
pacing. She also shared the understandings that she had gleaned from attending the training with Calkins: “The intent is not to try to squeeze every single thing she’s talking about into one day, but to pick out one of these things to really focus on.”

Yet the message that teachers were getting from the district administration seemed to contradict Melinda’s understandings about the importance of ownership:

The pressure came from higher up, follow this with fidelity. People throw around that word fidelity and it makes people really have a lot of pressure, oh I have to do this and I can’t veer off; I can’t make this my own at all.

Oak Creek’s decision to fully implement the UOS curriculum in that first year, rather than follow the phased implementation of Melinda’s previous district, also contributed to the pressure on teachers, “People felt like, well I have to get through the entire book.”

Melinda resisted district pressure to follow the curriculum exactly: “I follow exactly some of those ways to conference and things to say to [students], but… I’m going to take some liberties, my kids are who they are and this is what’s best for them.” Melinda saw the benefits of focusing on students’ needs: “In the beginning we might only get five minutes of writing time. It’s really important to just stop and come back to it the next day until they build stamina. Now my kids are writing for 45-50 minutes uninterrupted.” Melinda described her growth as a teacher in terms of her students’ work: “My kids now, it's like organized chaos, it doesn’t look fantastic but what’s in there is amazing. So I'm not so worried about getting a pretty thing to put in the hallway.”

**Participants’ Collective Experiences with the Units of Study Curriculum**

The interviews allowed participants to share their individual experiences during the district-mandated implementation of the Lucy Calkins Units of Study curriculum. While the
participants all taught in the same school setting during the timeframe of this study, they had varying perspectives on how the program was implemented and its ongoing effects on school climate, students’ needs, and their own sense of self-efficacy. Through the sharing of their stories, the researcher gained insight into how the Lucy Calkins Units of Study had been incorporated into participants’ daily practice and, in some cases, changed the way the teachers viewed writing instruction. While each participant’s experience with the Units of Study curriculum was unique, their combined experiences told a larger story. An analysis of the themes that emerged from their collective experiences provided a deeper understanding of the changes in participants’ instructional philosophies and practices as well as the compromises these teachers had to make to balance time constraints and student needs with district mandates. These understandings answered the primary research question, How did elementary teachers at Oak Creek Elementary School experience the required implementation of scripted writing materials in their classrooms?

The themes that emerged from an iterative analysis of participants’ interviews are presented in Table 2 and discussed in the remainder of this section.

Table 2

Themes Related to the Research Question

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<thead>
<tr>
<th>Theme number</th>
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<tr>
<td>1</td>
<td>Teachers found the narrative nature of the UOS materials difficult to navigate.</td>
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<tr>
<td>2</td>
<td>The teachers at Oak Creek felt they needed more training to support effective implementation of the Units of Study curriculum.</td>
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<tr>
<td>3</td>
<td>The teachers at Oak Creek felt communications from the district regarding expectations for implementing the Units of Study curriculum were unclear and inconsistent.</td>
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The teachers at Oak Creek felt that collaboration within and across grade levels would have positively contributed to their ability to implement the Units of Study curriculum.

Competing demands on limited instructional time created stress for teachers and negatively affected their efforts to implement the Units of Study curriculum.

The teachers at Oak Creek felt the district’s directives regarding the Units of Study curriculum hindered their ability to use their professional knowledge to meet students’ needs.

The Units of Study curriculum affected teachers’ senses of self-efficacy.

**Theme 1.** The first theme is *Teachers found the narrative nature of the UOS materials difficult to navigate.* The teachers unanimously cited the layout of the UOS materials as inhibiting their ability to effectively use the program in their classrooms. Their major concern seemed to be that the UOS materials did not follow the format that teachers usually identify with, a teacher’s manual. Rather than an easy-to-use guide, the UOS materials were a narrative description of how Lucy Calkins herself would teach the lesson. Both Julia and Lexi noted that the curriculum is “not user-friendly.” Lexi expressed the difficulty she had in using the UOS to guide instruction:

> I had to read it and then go back and annotate it, since it wasn’t my lesson. I had to know what it was, so I’d have to go back and highlight the key words so that when I’m glancing down I would remember what I was supposed to say next. …I don’t have to do that for math, you know? The math manual, I can pick up the math manual and I can read that in 15 to 20 minutes tops and be ready to go and in the middle of the lesson I can glance down and see what it is and be able to reasonably follow my place and in the writing lesson, it was harder to do that.
Julia concurred, stating that “being able to pick up their curriculum and go with it takes a lot of preparation on my part.” Rachel also felt that the narrative nature of the materials hindered its use:

I think … things are embedded and intertwined within the lesson, while the basal probably pulls things out a little bit more, such as you know write your beginning, your middle, your end, or what is your topic sentence, your details and your conclusion.

When asked about the amount and type of preparation required to teach one of the UOS lessons, teachers described spending hours getting familiar with the layout of the lessons, only to have to review them again prior to teaching. Rachel attributed the level of preparation to lesson plans that were “very detailed, very time-consuming to read.” Julia also cited the complexity of the materials and stated that she “just can't think that anybody would think this would be a really good teacher’s manual.” Abby suggested that the material was hard to use as a manual because “so much of it’s philosophy.” Whereas a lesson in a typical teacher’s manual is organized around a specified learning outcome, Rachel felt, as she attempted to use the UOS materials, that “it was challenging at first for even me to quite understand what I was supposed to get the students to understand.” Tim agreed, “I didn't [know] what the end product needed to be, where I wanted to be at the end.” The teachers described annotating the lessons: Rachel “wrote myself notes to make it make sense,” while Julia, Tim, and Lexi used Post-it notes to highlight key elements of the plan. Rachel said the increase in the amount of required planning contributed to the school “climate [going] downhill, everyone felt overwhelmed, confused, frustrated.”

After using the curriculum for four years, Julia said the process was “much easier…to pull out what the objective is; it's much easier to pull out the specific strategy [Calkins] uses to accomplish that objective” because Julia had become “more aware, more comfortable, more
knowledgeable of how [Lucy Calkins] structures her lessons.” Despite this increased familiarity, Julia said the narrative structure of the materials made her wonder whether “maybe [Lucy Calkins] never intended for these to be a teacher's manual, she meant for them to be novel studies or book studies the teachers took part in, either in schools or at the college level.”

**Theme 2.** The second theme is *The teachers at Oak Creek felt they needed more training to support effective implementation of the Units of Study curriculum.* All six participants expressed frustration with the lack of training provided by the district during the initial implementation of the UOS curriculum. The teachers felt that the materials were distributed with little thought to helping teachers become comfortable with the layout and use of the materials. The teachers were informed of the adoption at the end of the school year. Tim described feeling like the program was thrust upon them with no support: “We were given the materials, that’s how I saw it. We were given the materials and this is what you need to do and … you need to spend at least 50 minutes a day in Lucy Calkins writing.” The teachers were provided with materials to review over their summer break. As Rachel explained, while she appreciated the time to get acquainted with the curriculum, “Summer is my time and so expecting me to read, plan and be prepared to do this without too much training was difficult.”

Select teachers were provided with the opportunity to go to an in-person training with Lucy Calkins. Tim said the plan was that the school administration “took one person from each grade level, went to some training, and then they were supposed to spread their knowledge to us.” Rachel was one of the teachers who attended the training with Lucy Calkins. She felt that the message from Calkins contradicted the district’s message to follow the UOS materials exactly as written: “When I’ve gone to the trainings she'll say… if a student says this, here's an example of what to say or what to do. I don't think she even wrote it with the intent of say this
exactly.” Melinda attended an in-person workshop with Lucy Calkins twice, once with her former district and again after she transferred to Oak Creek. She agreed with Rachel that the program’s intent did not seem to be to provide a script, but rather a detailed guide for teachers to adapt to their own classroom setting:

She goes over several lessons and she answers questions and it wasn’t until then that I was like, oh she’s not saying that I have to say everything that she’s saying. She talked about her teaching points, and why she put some things in bold in the manual and it made a lot more sense as to how I could kind of make it mine.

Abby was also offered the in-person training but declined:

My principal, she was like, I’m going to get you to Lucy Calkins. Trying to send us to New York and stuff, and then my girlfriend and I were like we don’t want to go to New York, we’re so busy we can’t even do anything with our families. But if we could have had a half a day to talk with a bunch of teachers, it would have made all the difference in the world…. It would have been wonderful to see her, but that wasn’t what I needed.

The district did provide a brief training once school was in session, but Abby felt the training ignored the teachers’ needs:

It just feels like they never, they never take the teacher into consideration …. [The district consultant] would tell us to do something and say don’t worry about grading, and then we’re under the pressure of making sure we have a writing grade.

She described being unsure how to produce a writing grade using the UOS curriculum even four years into the program: “I don’t understand it. I know that one of the presenters that came, he kept saying don’t worry about the grading, that is not what we’re doing, we’re not talking about
grading writing.” Tim added that instead of training in the form of professional development inservice:

- Mostly [we were] encouraged to watch the videos. There's videos on YouTube and stuff that you can watch of her, I think it's her teaching, and there might even be some in the materials that they gave us, there might even be some videos on there, I'm not sure.

For Julia, the training provided by the district was too little, too late. When she transferred to Oak Creek, the school was already in its second year of using the UOS curriculum and Julia said her introduction to the curriculum was entering her classroom to find “the books, the teacher’s manuals, were in my room.” It was only after the school year began and Julia had already been teaching with the UOS materials that the district held a meeting for teachers new to the district. Julia said that during the 45-minute meeting a curriculum director guided the teachers through the supplementary materials on background knowledge and program effectiveness to “mark all the chapters with Post it notes.” The director then told teachers, “You need to read this before you start teaching.” Abby also remarked on the lack of training for new teachers: “They’ve got a lot of new teachers in the positions that didn’t have the training, unless they came from a district or something that did.” None of the teachers were aware of any effort to address program continuity with new teachers. As Abby stated, “I don’t think there’s going to be any more professional development [regarding UOS]. …We don’t get professional development like we used to. It’s just very quick, get it done, it’s over, move on to the next thing.” Tim concurred, “The longer I’ve been here, the more you don’t see training very much anymore.”
Melinda experienced UOS implementation in two different districts. While Oak Creek expected teachers to fully implement the curriculum during the first year, Melinda’s prior district used a phased approach to implement the curriculum:

We had the materials but then we weren’t implementing it right away. We went and watched some of the teachers who piloted it, as they taught it, and then we did some things after school where the teachers went through the manuals and kind of pinpointed some items…. I didn’t really dive in till probably like the middle of the year that they brought it in. We kind of spent that first semester of the year watching other people do things and our goal was just to get one unit done that year.

Lexi suggested that a phased implementation might have been helpful at Oak Creek, but even before starting with the units, “I would have [teachers] first have some training in general about a writer’s workshop and how a writer’s workshop works.”

While all the teachers identified training as a primary issue, Tim felt strongly that lack of training was “biggest trouble with the series.” He expressed doubt that administrators had implemented the program as intended: “Did the district do it the way it was supposed to be done? Is that, they just give it all to the teachers and you’re supposed to wing it?”

**Theme 3.** The third theme is *The teachers at Oak Creek felt communications from the district regarding expectations for implementing the Units of Study curriculum were unclear and inconsistent.* Throughout the interviews it was clear that real disparities existed between participants’ understandings of the district’s stance on how the program should be implemented.

Rachel stated that the message from the district was that teachers were “supposed to follow the lessons, lesson by lesson and do what it says and you’re not really supposed to supplement or do anything beyond what is in the book.” Rachel tried to implement the materials
with fidelity, but grew frustrated because she wasn’t sure the lessons were the best for her students: “I want to follow the rules and I want to do it the right way but is her way really the right way or is it just one way?” In discussing how she has adapted the materials to meet the needs of her students, Rachel seemed unsure whether adapting the materials went against the district’s directives:

Sometimes we hear that it's okay to do that and other times it's like no, you can't stray.

You have to teach with fidelity so we’re trying to get mixed messages a little bit. I think the district’s realizing that teachers of writing need to have some flexibility in doing this program justice and letting them teach it their way but I'm not sure that anything has been officially stated or said that says make it fit you.

Rachel felt that despite her adaptations, she was still implementing the materials with fidelity because “even though I might stray from her words I don't stray from the presented curriculum.”

Abby also described implementing the program authentically as being “more on the understanding side and I think that’s the fidelity part. You know I have to understand what I’m reading and come to a place where I can implement it.”

Melinda also felt pressure to “read all the stuff every night and do it just like [Lucy Calkins] did.” For Melinda that pressure caused her to feel “very scared and nervous” and wonder, “How am I going to memorize all of these things?” Upon later reflection, Melinda wondered whether some of the stress teachers felt was due to unclear communication from the district: “It was just like here’s your manual, this is the expectation…. I just always thought you had to memorize all this….I think as a whole we all felt this manual had to be followed to the T.”

After attending the in-person workshops with Lucy Calkins, Melinda concluded:
The intent [of the curriculum] is not to try to squeeze every single thing [Calkins] is talking about into one day… Some people felt like you’ve got to do a new lesson every day, and you don’t…. [Calkins] really stresses, you have to do what is good, best for your kids and if you don’t get to Bend 3, it’s okay. That was a hard part for people because they felt like, well I have to get through the entire book.

Lexi also felt district pressure to implement the program “with fidelity.” She described feeling “stress[ed]… out that someone’s going to see that in my plan book I never wrote session 14 in there, and… they’re going to say, but you said … that you’re teaching it but how come you didn’t?” Despite her assertion that she was “trying to be extra faithful,” Lexi came to define her role as controlling:

Not so much the planning but maybe the choosing, so … how can I take their curriculum and do the units with fidelity so that I’m teaching the skills and I’m teaching the lessons and we’re doing writing workshop and I’m still bringing in some of the other activities that I feel are really valuable and accomplishing both of those things while staying true to what I’m supposed to be doing and what I think is really valuable.

The lack of communication between district administrators and teachers may have been partially due to teachers’ concerns that they would get in trouble for asking questions. Lexi summed up that fear: “It just seemed like [teachers] were more worried about what administration would say…. People in general were more worried about getting in trouble than they were before.” Part of that fear was based on how teachers were treated when they voiced concerns. Lexi described feeling shamed by administration for sharing her concern that the materials required “a big time commitment every night to read these lessons.” The administration’s response was to tell Lexi that “You are professionals, and as professionals you
should be doing professional reading and that this is not above the expectations of what should be expected for professionals.” Abby also felt silenced by administration: “A lot of times it’s frustrating because … when we ask questions a lot of times it’s the elephant in the room and you know you’ve asked the wrong question…. They would shut you down so fast.”

Assessment was another area where teachers felt the district’s inconsistent messaging was an issue. As Abby explained, the district held an inservice to discuss the UOS curriculum, but the speaker refused to answer questions about grading. Instead Abby said he told teachers not to worry about the grading. This caused a great amount of stress for Abby, who felt that grading was “something we needed to all talk about. That was something we needed to decide as a group what to do with, but we didn’t.” Abby stated that she began to dislike teaching at that point because of:

The corporation’s insistence on not giving us time to share and talk and collaborate, and insist on grading, give a grade even though you don’t even know what you’re doing, and we’re supposed to do that to the children? It’s horrible…. I was learning and I didn’t have a handle on everything and I was experimenting and I don’t think that children should be put in the position where they’re in the experimental phase. We should all be taken out of that and actually be able to experiment without having to call it a final, done deal.

Lexi agreed that communication about grading expectations was lacking. She found it “hard to take a rubric score and put it as a percentage in the grade book” and felt that more guidance from the district would have helped teachers translate UOS assessments into report card grades.

Rachel indicated that communications regarding the UOS curriculum did not improve as the adoption progressed: “I don't know if we are being handcuffed to the curriculum as much as
we were told at the beginning, maybe we're given more freedom but the message is never clear to all.”

**Theme 4.** The fourth theme is *The teachers at Oak Creek felt that collaboration within and across grade levels would have positively contributed to their ability to implement the Units of Study curriculum.* Several of the teachers described a school-wide shift away from collaboration following the introduction of the UOS materials. While Lexi described a great deal of modeling and collaboration prior to the adoption, she said the district’s approach to implementing the UOS curriculum reduced collaboration at Oak Creek:

> There were definitely some people that wanted to help… they wanted to talk about it … but it just seemed like they were more worried about what administration would say. It seemed like people were afraid for them to find out if they were doing something that wasn’t Lucy Calkins.

The lack of collaboration left some teachers feeling isolated, specifically Tim and Rachel, both of whom mentioned feeling as if they were “on an island.”

All of the teachers in the study said that more collaboration would have been more helpful as they sought to navigate the materials. Tim felt collaboration across grade levels would have helped him have a deeper understanding of the program’s scope and sequence; he wanted to know: “What were the students learning in third grade and Lucy that I’m supposed to build on in fourth grade? I don’t even know, I don’t even know what the Lucy program looks like in third grade.” As he was an intermediate teacher, he described the need for “interaction between grade levels of what’s being taught so you’re consistent all the way through. I mean what’s the end game? Where do you want our students to be in 5th grade before they go to middle school?”
Julia said the district could have structured collaborative opportunities early in the adoption so that teachers would have had more support during early implementation. She suggested that the district could have tried:

Bringing us together, especially new teachers … and say okay, here are your writing standards… here’s the curriculum you’re going to be using. I’m going to give you time right now to familiarize yourself with your curriculum, to familiarize yourself with your standards, I want you to work on becoming familiar with them, blending them and I’m here for questions.

Abby concurred with Julia’s suggestion, and added that teachers would have benefited from continuing collaboration as they implemented the materials in their own classrooms:

If we would have had release time to talk, to talk together as groups to try to refine and figure out what we were doing, that would have been a huge help…. If we could have had release time to say this is what’s happening, this is how the kids are reacting, this is what worked, this is how I tweaked this, it would have been, it would have been so much more helpful.

Although neither of the districts in which Abby worked provided release time to collaborate on implementing UOS materials, in her prior district Abby did find time to collaborate: “I just had a really good partner and she and I collaborated a lot…. We pulled in ranks, we got tight, we talked a lot, we tried to be protective of one another.” Abby stated that at Oak Creek, “I have no collaboration here.”

Melinda suggested that part of the reason teachers at Oak Creek did not seek out collaboration on their own was fear of being judged:
I think that Lucy is intimidating and I think that people kind of hid a little bit because they were trying to figure this out and I think there’s an element of, I thought I was a good writing teacher and maybe I’m not and I am a little embarrassed.

Eventually Melinda built trust with the people at her grade level. As they began to discuss the UOS materials, Melinda said she had found “better collaboration, it’s more meaningful” than the collaboration in her former district, which focused more on “we’re going to do this pretty artwork.”

**Theme 5.** The fifth theme is *Competing demands on limited instructional time created stress for teachers and negatively affected their efforts to implement the Units of Study curriculum.* Each of the six participants cited time constraints as impeding their ability to effectively implement the UOS curriculum. While all of the teachers felt that there were too many demands on instructional time to dedicate the required number of minutes to UOS, a few of the teachers pointed out issues within the UOS curriculum that created undesirable effects on student engagement or on their own ability to prepare and teach the materials.

*General demands on instruction time.* While all of the teachers at Oak Creek valued writing instruction, every one of them cited pressure to fulfill competing requirements as impeding their ability to provide that instruction, especially when asked to follow a writing curriculum as complex as Units of Study. Tim summed it up, “It’s overwhelming. It really is, just, it seems like it's just going all the time….You have to juggle every day, there’s almost way more than can actually get in, in a day.”

Of primary concern was the time student spent taking standardized tests, especially ISTEP. Abby shared, “We’ve had a lot of testing at the beginning of the school year here, so I felt very interrupted.” She stated that UOS required “consistency of being able to do it every
day,” but consistency was impossible when “some of these tests take different kids different times, so I have kids doing all sorts of things and there’s no continuity.” Julia also indicated that the UOS curriculum was “put to the side” in favor of testing and other commitments: “To be completely honest, as the year went on, I still taught writing, but I didn't follow the Lucy Calkins lessons, because … things get so busy with the holidays and just testing and testing and you don't have time.” Abby seemed to voice the dismay of all of the teachers when she described recent upheavals in the tests required by the state of Indiana, “We were so excited because we got rid of one testing but we got something else just as big and cumbersome. So it’s like there’s no hope.”

In addition to the actual time spent testing, large amounts of time were used to prepare students for the tests. Tim said that “how close ISTEP is” factors into what skills he taught: “Those are always priorities. Not that I'm teaching to the test, but I know they're going to see [certain skills] and I don't ever want my students taking a test and they haven't ever seen something like that before.”

According to Tim, testing was not the only reason it was hard to find time for UOS. The district also mandated the use of Edmentum and its component Study Island, which are computer-based learning tools intended to provide students with online independent practice and assessment in language arts, math, social studies, and science. Tim said the addition of computer instruction along with UOS was too much:

There are so many other things they want us to do. I mean they've introduced things this year… they want us to spend 20 minutes on Edmentum. We need to spend so many minutes in Study Island, and that's not even in teaching, that’s just on the Chromebooks.

Issues within the UOS curriculum. Time constraints related to the UOS materials were also cited as negatively affecting the implementation of the curriculum. The primary concern
among teachers was the large amount of time it took to prepare to teach a UOS lesson. Lexi said she attended a district meeting where “a lot of teachers mentioned this, it’s a time commitment every night to read these lessons.” Julia felt the program’s supplementary materials, which the district declared required reading, were a burden: “I'm up to my eyeballs and, and things to do, I don't have time to read two extra books right now when I'm just trying to read through a 10-page lesson before I teach it the next day.” Teachers cited spending between 40 minutes and two hours preparing to teach one UOS lesson. Abby found the time commitment to be completely overwhelming: “I couldn’t go to church, I couldn’t attend family gatherings. It took a lot of time… to understand it and prepare.”

Teachers also indicated that they had to spend substantially more time grading writing than they had in the past because of the UOS guidelines. Even though the district gave them a release day for grading, Abby said when she taught middle school she “had 150 kids and I might have gotten 30 papers graded and the rest of it was on my time.” Lexi also found the grading overwhelming:

I have to take it all home and grade it…. I know that they’ve worked so hard on it, so I want to make sure that I’m giving them the same effort back in terms of their feedback and helping them as writers.

Abby said one of the effects of all the extra grading was that several middle school language arts teachers left: “If you look across you know the subject areas, [the grading] wasn’t equitable. You just couldn’t do it.”

Another issue was the amount of instructional time teachers were supposed to dedicate to the program within a week. As soon as the district introduced the curriculum, Rachel knew teachers would experience problems finding enough time to teach it:
We were supposed to do it I believe four days a week, for 40 minutes minimum, which is very difficult in the elementary school when you're also told that you have to do X amount of time on reading every day, and X amount of time on math every day.

Julia also felt it was a struggle to fit 40 minutes of writing into an already packed day: “Don't forget your reading instruction, and your math instruction, and your science and social studies instruction, and your handwriting instruction, and your vocabulary and word-master, and they have to go to specials and recess, and they have to eat.” Abby felt that the district mandates were unrealistic and said she would “like to see [administrators] take that and turn their whole procedures upside down. Just turn them upside down, don’t get any extra time, just do it.” Rachel summed up the frustration teachers felt, saying they were “feeling pulled in every direction, and you know you pull a rubber band long enough, a rubber band just breaks.”

Although Tim also expressed frustration with trying to fit in all the required materials, he seemed resigned: “There’s all this other stuff we have to do too, like the prompt writing that they throw in and I try to do the best I can and try to make it as effective as I can.” Lexi admitted that even though she felt “more stressed out all sudden of trying to keep making sure that they need a half an hour to write every day,” in reality if the students wrote for less time, “maybe it was 20 minutes today, it’s not the end of the world.” Rachel said that even if she dedicated 40 minutes per day to the UOS materials, there was “no way you could do the whole lesson justice in 40 minutes, and if you wanted to do it justice, and get the kids to truly understand all the different parts within the lesson.” Rachel also felt that the time spent with the UOS curriculum prevented her from teaching creative writing, which she found to be a valuable aspect of writing:

It doesn’t matter if you’re writing a research paper, persuasive writing, creative writing; writing’s writing, you still need to be able to express your thoughts, have voice, be able
to expand upon ideas, use your punctuation to make meaning of your writing. It’s not that Lucy squelches that, it’s just that sometimes there’s so much to cover within a unit that it, it can’t happen.

Two of the teachers mentioned the length of units as a concern. UOS units were structured to last about six weeks, during which time the students focused on one piece. Lexi said the program encouraged teachers to “drag out the story for a long time too because we write the narrative and we try and use the same narrative for all the different things.” While she felt it “great to get one really good final narrative;” she said the consequence was that “by the end [students are] like oh, I’m sick of this topic…. I’m not sure that they feel like they care about the writing as a writer would, after the end of the process maybe.” Rachel described the effect she observed: “The students did not seem to be engaged in the writing, it was too much time on one piece.”

Theme 6. The sixth theme is The teachers at Oak Creek felt the district’s directives regarding the Units of Study curriculum hindered their ability to use their professional knowledge to meet students’ needs. The teachers valued freedom to use their professional knowledge to adapt instruction to meet students’ needs, but felt that the district’s mandates prohibited them from varying from the prescriptive nature of the UOS curriculum. Rachel felt that using the UOS materials to the exclusion of everything else was counterintuitive: “Why would you not let [teachers] take the best of many programs, put it together and let them be creative with various programs to help the students be successful in writing?”

Every one of the teachers adapted the materials in some way, despite believing that such adaption would incur disapproval from district administrators. The amount of adaptation varied from Abby, who said, “Calkins drives [instruction], but I certainly haven’t thrown away
everything I learned about writing,” to Rachel, who said, “I have my own binder with my own writings or student examples or sentences, and sticky notes, and things to help me so that the lesson is more mine than [Calkins’].” Teachers stated a variety of reasons for adapting the materials, including the method of implementation, students’ differing abilities and interests, and their own purposes for teaching writing.

The curriculum was implemented simultaneously across all grade levels. As a result, students missed out on foundational elements of the program that would have been taught in previous grades. Abby said this lack of foundation made the curriculum “very difficult” for the students:

They did their best to try to meet expectations, but it’s always “They’re going to catch up, we’re going to implement this now and by the time these kids get to sixth grade they’ll know what they’re doing.” But we are actually operating in those gaps where they don’t know it.

Rachel concurred, stating that the result of simultaneous implementation had been that students at the upper grades were not ready for the materials. She said she understood “the stretch” but felt that the students “needed to have started in third grade because that's just where our kids [were] at that time. I think we were expecting too much, too soon.” Lexi also felt that if the curriculum had been implemented by grade level, it would have given the students time to build writing stamina:

They weren’t used to necessarily the stamina of keeping writing for a half an hour, but they’re supposed to be writing for a half an hour and some of them weren’t quite ready for that, so the first year it felt like there was a lot of time where they would [say] “I’m done,” and they didn’t get that we were going to be writing for this whole time.
While Lexi agreed that the simultaneous implementation made things difficult, she said she definitely had noticed improvement as “more kids have been in it from kindergarten all the way up.” Lexi also stated that she adapted the curriculum “to kind of build the stamina up in the two weeks before we started the units just by working on writer’s workshop.” It’s hard to say whether the improvements Lexi noted were due to students’ increased exposure to the materials, as she suggested, or to the additional time students spent writing before beginning the units.

Teachers also felt that the UOS curriculum did not take into consideration the specific needs of Oak Creek students. Julia called this “a great hypocrisy in education,” adding:

All the time we hear differentiation, differentiation, differentiation. Differentiation isn’t just, you do seven problems and I do 10 problems, differentiation is also the speed, differentiation is also processing, differentiation is maturity levels, differentiation is manipulatives. You can't be stuck to a calendar that you have to follow and still truly differentiate to meet the needs of your kids.

Sticking to a calendar was frustrating for most of the teachers. Rachel said the message from the district was “we cannot stray off course, and you have to follow the lessons as they are in progress as they are.” The majority of teachers noted that following a strict schedule did not allow them to address student needs. Rachel stated that she did not “like my hands tied behind my back.” Lexi admitted that she often had to adapt for pacing:

I’d be like no, they’re not quite ready for this, let’s work on this first. Or there were a couple times where I’m like these two lessons can be combined into one day of building characters, and then I had classes where I was like oh my goodness, we need two full days on this, they’re still not grasping this skill.
Rachel said the curriculum “it didn't always fit my class…. Many of my students still are not even at the fifth-grade level of writing and they struggle.” She felt the materials did not always match grade-level needs, especially with regard to writing to a prompt or timed writing exercises, “which really is more of the type of writing that students as they get older need to be prepared to do.” While she found value in the narrative and opinion pieces included in the UOS curriculum, Rachel stated that some of the types of writing were not appropriate to the grade level; for instance, a “ten-year-old having memoir is, I think, a little bit of a stretch.”

Teachers mentioned that they also adapted the UOS materials in order to increase student engagement. Julia acknowledged that differentiation in writing instruction has always been hard for teachers because student interest varied so widely:

Some [students] come to you and they love writing and they write and write and write and write and write, and other ones, they can't even think of a topic to write about, or even when you give them a topic that you know, something you know about them that you know they're interested in. They play basketball six months of the year, they go to practice five days a week, well let’s write about basketball. [The student might say] “I can’t write about basketball.”

Despite this difficulty, Julia insisted differentiation was important because students are “human beings, they’re not robots, they’re not boxes, they’re individuals with lives and thoughts and brains and different feelings and different emotions and different backgrounds and different experiences. They’re not machines.” Tim mentioned that the materials “just really didn’t relate to my students at all and it might just be the school I’m in but it just didn't relate to them, so I had to change it.” To make the material “relate to the students a little bit better,” Tim “changed a lot of the narrative to something about me or something I saw.” He felt his narratives increased
student engagement because students were more interested. A few of the teachers indicated the need to shorten lessons for units so that students remained engaged. As Lexi said, the UOS units “drag out the story for a long time too because we write the narrative and we try and use the same narrative for all the different things.” She stated that as a result, students were “sick of this topic” and no longer “care[d] about the writing as a writer would, after the end of the process.”

Teachers also indicated that they adapted the UOS curriculum when it did not address their own purposes for teaching writing. Two purposes that teachers mentioned were enjoyment and being prepared for real-world writing. All of the participants felt it was important that students enjoyed writing. Julia said the directive to follow the UOS affected the school climate because teachers were “upset and just felt that the things that they knew were valuable for kids, or that kids looked forward to every year because they remember when their brother did it, and now they didn’t get to do that.” While Julia acknowledged that some of those activities may not have been “necessarily a super standards-packed lesson,” she asserted that her students were “still kids and they should still have fun.” Rachel expressed frustration:

Students are missing out… just fun, creative writing…. It seems like anything that allows the students to be creative kind of gets cut, art gets cut and just creative writing is, is an art and it seems to be cut.”

Abby said she “still had strategies and things we did that we knew our kids loved and enjoyed, so we interspersed those.” Tim tried to personalize the activities whenever possible because he found that “the more personable you make it the easier it is for the students to write a lot of things.” Tim also stated that he liked “mix in [activities] that are really memorable to [students] and that makes it fun.” Lexi also found that students enjoyed going beyond the genres included in her grade level’s UOS materials. As Lexi explained, poetry seemed to be one of the areas that
helped students enjoy writing: “I’ve always taught poetry and for some of my reluctant writers, like they finally find something that they can get behind. Like ‘Yes! Short and simple.’ So I wasn’t going to give that up.” To make room in the schedule for poetry, Lexi had to abbreviate UOS units. She described how she would “take out six lessons out of narrative and… take three lessons out of the whatever other genre that I choose” to reclaim “two weeks [when] I can do poetry or whatever.”

The teachers also felt the need to adapt the UOS curriculum when they felt it did not prepare students to write for purposes other than school. Julia expressed this adamantly:

I'm going to add in what I feel like I need to add, you know? If my kids are not writing complete sentences, we're going to take some time we're gonna write, learn how to write complete sentences. I'm sorry if that's not the exact lesson of Lucy Calkins, but they need to be able to speak and write in complete sentences for everything they do in life, from a job interview to a discussion with a colleague to tenth grade math. It’s something they have to do and it would be a disservice to them if I didn't make sure they could do that. Melinda said the problem was less about the curriculum and more about the idea that it was to be followed exactly as written:

[Calkins] is not saying you’re teaching my writing workshop model in your class, she would say you’re doing your writing workshop with my advice on how to help your students write a unit about opinion. It’s not her class and you have to make it your own…. I’m going to take some liberties, my kids are who they are and this is what’s best for them.

Overall, the teachers wished that administrators had recognized the need to adapt instruction to meet the individual needs of their classes and had not insisted the UOS curriculum
be followed as written and on a tight regimen. As Rachel put it, “I don’t think there’s one program out there that addresses every single skill that a student may need. There’s always some supplementation needed.” Abby felt that having a writing curriculum to teach strategies was important, but it was also important to allow students to apply those strategies in ways that made sense for them. As she explained, “My big ah-ha moment was all this stuff is strategy, but then there’s a craft and we have to allow [students] their own style and craft.”

Theme 7. The seventh and final theme is *The Units of Study curriculum affected teachers’ senses of self-efficacy*. The teachers at Oak Creek proved to be reflective practitioners who connected student learning to their own efforts as teachers. In discussing self-efficacy, the teachers were encourages to compare how effective they felt before, during, and after implementing the UOS curriculum. Overall, the teachers indicated that they felt an initial drop in self-efficacy as they attempted to reconcile the new materials with their previous methods of teaching writing.

The majority of teachers felt a greater sense of self-efficacy after using the curriculum for four years. Abby said the program “expanded our toolbox” and that the students’ “writing got so much more powerful. It was powerful writing, it wasn’t just a piece; [students] were invested in it.” As evidenced by Lexi’s statement that she “made a big impact on [students] when we did writing,” Lexi had a strong sense of self-efficacy prior to the adoption of the program. Lexi gauged her efficacy before UOS as an eight on a 10-point scale. Unlike Abby, Lexi felt a temporary drop in self-efficacy as the district implemented the UOS curriculum, explaining that she was “always kind of down on myself…. I mean I felt like I was still a good teacher, but maybe a six or seven [on a 10-point scale].” Lexi stated that once she “found balance” between the UOS curriculum and her own style of teaching, she “felt good about that.” Julia also
attributed a rise in self-efficacy to such balance. She described writing instruction as having always been her weakest area and said she felt even less effective during the first year of using the UOS curriculum. Julia recognized the transactional process that occurred when she gained familiarity with the materials:

I think as I use it more and become more familiar with it, I think that it is helping me to be more effective, but also as I’m using it and becoming more familiar with it, I’m also tweaking it to what I need it to be much more.

Melinda indicated that sometimes efficacy is about changing the definition of learning:

“We’re changing the idea of what writing is and we want to be more student-driven rather than teacher-driven.” This theme was evident in Melinda’s discussion of her own self-efficacy. Before the district adopted the UOS program, Melinda would have defined herself as an effective writing teacher, “I never once doubted myself…. I had good evaluations, I was in a comfortable place.” Reflecting back, Melinda said she was “definitely not” an effective teacher. She used writing conferences as a comparison point. Before UOS she doubted “a kid said more than five words at the conference.” Melinda said before UOS she defined conferences as “Teacher swoops in, helps [students] fix all the mistakes and that’s not what a conference is at all.” Melinda’s new definition of conferences was that they were “definitely student led. I am there to write notes so that I can make minilessons or make sure that they have the tools they need to be successful.” She stated that the shift in responsibility for the writing helped her be more effective in making “the student not just a person sitting in my class but someone who is here ready to learn and participating and be active in their learning.”

Although the majority of teachers indicated feeling increased self-efficacy compared to before the OS curriculum, Rachel and Tim stood out as exceptions. Rachel stated that “I still feel
like I was a better writing teacher prior to the program.” She attributed her efficacy to her own abilities, “part of it was just me.” She had her own “toolbox” and “could just read a piece of their writing and give feedback and know how to stretch them.” She felt the district hindered her ability to help students grow as writers when they adopted the UOS curriculum because she was “handcuffed to the curriculum.” The UOS program did not increase Tim’s sense of self-efficacy either. He admitted that he “always struggled at writing, so it’s always been something that’s been difficult for me to teach. I’ve always felt that was my weakness.” He noted a drop in his efficacy during the initial year of the adoption: “As we went through that year I think [students] would come out weaker, rather than stronger, because [teaching writing] would be what I would avoid.” To increase his comfort with the materials, Tim adapted the narratives to reflect his own experiences. Although Tim felt that “once we were using my narratives I became more effective. I felt like the writing was way more effective, the way I was teaching was more effective,” he said overall his self-efficacy is at the same level it was before UOS:

I felt like I was on a moving up with what I had until this material was kind of given to us, so then I felt like I'm just, I am in the same place…. I don't think I've gotten any better, but I don't think I've gotten any worse …. I've still been trying to wade through [the UOS curriculum] as much as I can, but honestly it's the first thing that I avoid because it's my biggest weakness.

Like Rachel, Tim felt that the district’s mandates to use only the UOS curriculum affected his ability to teach effectively: “I had this wide range of materials to use and now I just have [UOS].” Tim also felt that he “could be more effective with better training.”
Conclusion

This study explored the lived experiences of writing teachers as they implemented a district-wide adoption of scripted writing curriculum. Interviews with participants revealed seven themes related to how elementary teachers experienced the implementation of the Lucy Calkins Units of Study curriculum, which was mandated by the school district in which they taught. In analyzing these seven themes it became apparent that participants felt the Units of Study materials were difficult to use as instructional materials and failed to fully meet the needs of their students. Moreover, participants felt that their district unknowingly undermined efforts to implement the UOS curriculum by failing to provide adequate training and opportunities for collaboration, failing to communicate clearly about implementation guidelines, and not allowing for the adaptations needed to successfully differentiate instruction to meet student needs.

The information participants shared during their interviews and the themes that emerged through an iterative analysis of those interviews provide important information as one considers how school districts approach curriculum adoption. While it has been said that change is the one constant in education, how that change occurs has consequences for school districts that may affect student learning and teachers’ sense of self-efficacy. These consequences and possible implications for practice will be discussed in Chapter 5.
Chapter 5: Findings and Discussion

Revisiting the Problem of Practice

Underdeveloped literacy skills have been linked to high incidences of student retention, assignment to special education, and failure to graduate (Schmoker, 2007, p. 488). Despite the imperative that students receive high-quality instruction in literacy skills, there is much debate about what quality instruction looks like and how to ensure students receive it. Efforts have focused mainly on outcomes, in the form of state standards and progress toward those standards as measured by standardized tests. Districts have recently begun to turn to scripted curricula as one possible way to ensure all students receive the same instruction. The Lucy Calkins Units of Study writing curriculum is one such program.

This study explored the lived experiences of elementary teachers whose school district mandated the adoption of the Lucy Calkins Units of Study writing curriculum. Despite initial teacher buy-in and evidence that the pedagogy used with the Calkins approach was rooted in best practices, many teachers at the school struggled with implementing the program in their classrooms. Examining the experiences teachers had when implementing the mandated materials increases awareness of how teachers perceive and enact curricular change, and also provides insights into how administrators might effectively support teachers during curricular adoptions.

Revisiting Methodology

This study was designed to answer the following research question: How did elementary teachers at Oak Creek Elementary School experience the required implementation of scripted writing materials in their classrooms?

Interpretive phenomenological analysis allows for deep exploration of the personal and situational factors that affect persons as they make sense of a common experience. Since the
purpose of this study was to examine how teachers experienced the implementation of a new curriculum, IPA was used. Semistructured interviews were conducted with six participants, all of whom taught at the intermediate level at the same school. Participants’ responses were transcribed and reviewed through an iterative process that involved analysis of individual experiences and resulted in the emergence of common themes among participants. IPA requires a researcher to maintain the participants’ personal meanings even as they are incorporated into the examination of larger themes (Larkin, Watts, & Clifton, 2006). To accomplish this, direct quotes were used whenever possible and enough description of participants’ responses was included to allow the reader to understand the participants’ experiences and the researcher’s analysis.

Chapter 4 provided insight into participants’ stories through illustrative quotes and an analysis of emergent themes, and the current chapter will discuss the findings in relation to the literature and theory. The chapter will conclude by proposing implications for practice and future research.

**Interpretation of Key Findings**

Several themes emerged as participants shared their experiences implementing the district-mandated adoption of the Units of Study curriculum. These themes served as the foundation for the key findings, which are illustrated in Table 3 and further discussed in the remainder of this section.
Table 3

**Key Findings**

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<tr>
<th>Finding number</th>
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<tr>
<td>1</td>
<td>The manner in which the district communicated regarding new curriculum negatively affected teachers’ implementation.</td>
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<tr>
<td>2</td>
<td>The Units of Study curriculum required a philosophical shift for some teachers</td>
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<tr>
<td>3</td>
<td>Teachers felt most effective when they used their own toolbox to purposefully combine methods based on their understandings of students’ needs</td>
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<td>4</td>
<td>Teachers felt that training and purposeful collaboration were necessary when implementing new curricula</td>
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**Finding 1.** The first finding is *The manner in which the district communicated regarding new curriculum negatively affected teachers’ implementation*. The teachers at Oak Creek Elementary were accustomed to change. Most of them recognized the need for continual growth to best meet student needs. So why, then, did participants use negative words like “brainwashed,” “handcuffed,” “policing,” and “not fair” when describing the implementation of the UOS curriculum in their school? Much of the resistance seemed to stem from the district’s unclear communications regarding the method of adoption, expectations for fidelity, and potential consequences of not following district mandates.

All of the participants felt that the district had circumvented established protocols as it adopted the Units of Study curriculum. Rachel’s indication that her view of the adoption represented “an outsider’s perspective” is particularly telling, given that she was a member of the school’s writing committee. Rachel felt that the decision did not seem like a “typical adoption
where you had a committee of teachers who looked at various programs,” but rather felt that UOS was “chosen for us.” While she did not feel completely blind-sided that UOS was being considered, she felt left out of the decision making completely: “It just kind of seemed to be like conversation at first and then the next thing you know, surprise, everybody has books, you’re doing it district wide.” Lexi also served on the writing committee for Oak Creek and felt the decision was “rather sudden.” She said that the district gave the writing committee materials to examine, but then excluded them from the final decision. Julia stated that she had:

Trust that the people above me who make the adoption decisions and who have the time to go through and make sure that things are correlated appropriately. … I trust them that they're going to make the best decision possible so that I can have the tools I need to let my kids be at the level they need to.

Despite this “trust,” Julia stated that she “just can't think that anybody would think this would be a really good teacher’s manual.” To help her understand the reason for choosing UOS, Julia would have liked the district administration to have shared “the purpose and their thinking behind the adoption of the curriculum.”

Teachers also felt resentful of the district’s implication that they would “get in trouble” if they failed to implement the curriculum with fidelity. Melinda discussed the effect the directive had on teachers, stating that they experienced “a lot of pressure, oh I have to do this and I can’t veer off, I can’t make this my own at all.” The problem here was twofold. First, the definition of fidelity was interpreted differently. All of the teachers expressed the district’s mandate in terms of the number of minutes teachers were to spend teaching UOS materials. The messaging there at least was consistent: Teachers were to spend approximately 45 minutes, four days per week teaching writing with the UOS materials. The discrepancy involved what it meant to “teach with
fidelity.” Melinda stated, “The pressure came from higher up, follow this with fidelity.” Tim said when he heard the term fidelity, he “took it as how much am I using it…. Everything is always minutes you know, and being that I’ve been around for so long, I mean everything is minutes.” This view was certainly reinforced by the district’s repeated reference to 45 minutes, four days per week. Rachel shared her feelings that teachers had received “mixed messages…. Sometimes we hear that it's okay to [adapt the materials] and other times it's like no, you can't stray you have to teach with fidelity.” Rachel’s definition of fidelity was unrelated to time and instead focused on the imperative that she “follow the lessons, lesson by lesson and do what it says and you’re not really supposed to supplement or do anything beyond what is in the book.” While Abby cited a similar definition of fidelity, she added the caveat that she should follow the lessons “to the best of my ability.” Lexi also had a modified definition of fidelity, in which she asked herself:

How can I take their curriculum and do the units with fidelity so that I’m teaching the skills and I’m teaching the lessons and we’re doing writing workshop and I’m still bringing in some of the other activities that I feel are really valuable and accomplishing both of those things while staying true to what I’m supposed to be doing and what I think is really valuable?

The second problem with the implication that teachers would face consequences for failing to use the UOS curriculum with fidelity was the lack of clarity regarding how fidelity was to be enforced. Rachel said the mixed messages from the district contributed to a “don't ask, don't tell philosophy” among teachers. Melinda worried that administrators would enforce fidelity through observations: “If I come to an observation or I come in your room, I’m on Bend 3, Lesson 5 and I should pick up that manual and be able to follow what you’re doing.” Rachel described herself as someone who wanted to “follow the rules and I want to do it the right way.”
Her feeling that she had to follow the curriculum as written, but that others were not, led her to feel frustrated and ask, “How is it fair that I'm doing this and somebody else isn't?” Rachel also questioned the consequences for other teachers not following the rules: “Who's watching to see whether or not they are? So it's kind of frustrating professionally to know that, well if they're not even doing it then why can’t I make this fit me?” Lexi also described feeling “worry about [administrators] policing everyone, and stress … that someone’s going to see that in my plan book I never wrote Lesson 14.” Lexi acknowledged that some teachers were trying to be “extra faithful” to the curriculum, while others “are just like you know what, forget it, nobody’s in here checking up on me anyway … so I’m going to do what I want anyway and you don’t like it, I’ll deal with it when it happens.”

**Finding 2.** The second finding is *The Units of Study curriculum required a philosophical shift for some teachers*. One of the salient themes from Abby’s interview is that a lot of the time she spent preparing to teach the UOS materials was devoted to understanding the rationale behind the program. She described spending hours reading and re-reading the lessons to figure out how to teach them, but she then stated that much of the narrative was “philosophy.” Participants’ interviews illustrated that many felt a shift in the philosophy of writing instruction communicated by the district as they transitioned into the UOS curriculum. These changes felt seismic to some teachers.

The areas that seemed to require the most substantial shift in values were the amount of instructional time dedicated to writing and the types of writing in which students should engage. As the district adopted UOS, administrators communicated that teachers should spend 40 to 50 minutes four times a week using the materials. Abby stated that “our whole curriculum went from a language arts mixture to solid writing. So that meant everything was writing, all the
grading was writing, so I felt like we should just call it a writing class, not language arts.” She stated that she did not “want to use the word brainwash,” but that she felt brainwashed because of all the “reading and studying and talking back and forth with myself and then my colleague” that she had to do to understand the underlying philosophy of the program. The UOS curriculum also required teachers to engage students in certain types of writing. Although Tim and Rachel had previously focused on forms of writing to guide their instruction, the forms emphasized by UOS were different. Prior to the adoption, Tim had used the state standards to determine “five or six different forms of different writing that the standards wanted us to write to and we just worked on those forms.” The UOS curriculum required a narrowed focus on three main types of writing: narrative, informative, and argumentative. Rachel found the UOS “lacking in that type of writing, which really is more of the type of writing that students as they get older need to be prepared to do.”

An additional difference between UOS and prior approaches was the role of the teacher. Lexi appreciated UOS’s focus on empowering students as decision-makers in their own writing; she said the program had “a lot of lessons that say, ‘Writers, you’re your own boss, you have got to decide. I can’t decide for you. You have great ideas.’” Melinda credited the UOS curriculum with helping her realize that students were capable of directing their own learning. While Melinda used to view the teacher as the one who “swoops in, helps [students] fix all the mistakes,” after becoming comfortable with UOS, she began to structure conferences with a different expectation:

My students know now that when I come for a conference they better have something that they want to talk about…. My kids know the first question I’m always going to ask
them is, “What are you working on as a writer or how can I help you as a writer today?” I think having them acknowledge what they think they need help with is so powerful.

Not all of the participants were comfortable turning over the reins to students. Rachel did not care for the UOS belief that students should direct their own writing conferences. She said allowing students to set their own goals was “not a bad thing, but [students] don't know. They'll say ‘I need capital letters, I need paragraphs,’ well yes but how about the actual content of the writing?” Rachel felt the UOS was less prescriptive in terms of student outcomes and that its rubrics encouraged a holistic approach, rather than focusing on the development of isolated skills that could be measured. Rachel stated that this lack of direction contributed to students having “a harder time knowing what to work on” and she, as the teacher, had “a harder time knowing what to tell them to work on because they need to work on everything.”

**Finding 3.** The third finding is *Teachers felt most effective when they used their own toolbox to purposefully combine methods based on their understandings of students’ needs*. One of the frustrations expressed by several participants was the district’s mandate that teachers use the Units of Study curriculum to the exclusion of other writing programs. Many of the teachers felt that they had a variety of materials that were already effective and were reluctant to set aside what they already knew worked. While change can be good, change without explanation can make teachers resistant. Tim expressed doubt regarding the reasons for some of the changes: “Whatever the trend was, is kind of what they want us to do.” He also felt that the district did not always give teachers enough time to become proficient in one program before switching to the next:
There’s new things and then within a year there’s something new again. Once you’ve been around long enough you start to see all these crazy trends where you start to get this and then they want you to do this.

He was frustrated when the Writer’s Express program, which he found particularly effective, was “just taken out of our room, all the materials and everything.” Tim was also reluctant to stop using materials provided during a previous district workshop on prompt writing. He had found those materials beneficial: “I felt like every year my students, because of the Kay Davidson writing prompt stuff, they came out strong.” Melinda suggested that teachers needed time to transition to new materials and cited the district’s previous initiative on assessment as an example, “We had spent so much time on all of the 6 Trait stuff [Kay Davidson] that we had and we just didn’t want to throw it out, if we weren’t 100% confident with that new evaluation tool.”

Prior to the adoption of the UOS curriculum, Lexi felt she was an effective writing teacher, one capable of having “a big impact on [students] when we did writing. I felt like more kids enjoyed writing, even my reluctant writers.” As she discussed the UOS curriculum, Lexi stated that there were many benefits to the program, but she lamented the loss of “all the amazing things I’ve been doing before and now I’m not supposed to do those things…. things that I knew were valuable to the kids.” The majority of participants felt that they had developed effective methods of teaching writing during their years of experience prior to the UOS adoption. They were open to adding new methods, but as Abby expressed, they did not want to “throw away everything I learned about writing.” Abby defended her need to be an instructional leader in the classroom:
We’ve been handed so many things since I have 26 years of experience. I’ve always interpreted, they thought the program taught the kids rather than the teacher teaching the children, and I can’t operate on being the program, I have to operate on being the teacher. Tim said the district’s mandate to use UOS to the exclusion of other material had reduced the effectiveness of his teaching: “I had this wide range of materials to use and now I just have this.” Rachel also voiced this frustration when she asked: “Why would you not let [teachers] take the best of many programs, put it together, and let them be creative with various programs to help the students be successful in writing?”

**Finding 4.** The fourth and final finding is *Teachers felt that quality training and purposeful collaboration are necessary when implementing new curricula.* The most salient finding from this study was that the participants defined training and purposeful collaboration as necessary components of the successful implementation of new curricula. All of the teachers felt that the district failed to provide enough training to support implementation of the UOS curriculum in their classrooms. According to the participants, they were given the curricular materials at the end of one school year and expected to be ready to teach it on the first day of the next school year. Although the teachers found it helpful to have time to review the materials prior to teaching them, they felt that training would have been a better use of their time. The lack of training was not absolute -- the teachers acknowledged that the district did bring in consultants for a short training -- but by and large that training was inadequate. As Abby expressed, the presenters had their own agenda and failed to “take the teacher into consideration.”

Half of this study’s participants (Lexi, Melinda, and Rachel) received district funding to attend a workshop led by Lucy Calkins, the developer of the UOS curriculum. Those teachers found the training helpful, but they lamented the fact that it was offered after implementation of
the UOS curriculum had begun. This seemed to mirror Julia’s experience as a new teacher in the district, when the district trainer directed her to “read this before you start teaching” two weeks after the school year had begun. Additionally, those teachers returned to Oak Creek with new understandings about the curriculum’s intent that seemed to contradict the district’s mandates regarding fidelity. Melinda understood the message from Calkins to be that effective implementation requires adapting the materials to make them work in the particular setting. Rachel concurred, stating that Calkins described her scripts as examples of strategies that teachers could use. Lexi also believed that the UOS materials provided insight into “what a writing classroom should sound like, this is how writing teachers talk, these are the kinds of things that you can say and how to say them.” Despite these understandings gleaned from Calkins herself, all three teachers felt tremendous pressure from the district to implement the lessons exactly as written.

Many of the participants also mentioned purposeful collaboration as a necessary component of effectively implementing new curriculum. Abby felt that the UOS curriculum required teachers to understand a lot of philosophy if they were to properly implement it. She described her own procedure of studying the material independently and then “talking back and forth with … my colleague” as helpful in processing the underlying tenets of the program. Because Abby and her colleague did not have opportunities to converse during the school day, those conversations spilled over into their personal time, causing stress. Tim also wished for more opportunities to talk with other teachers, especially teachers in other grades with whom he could discuss vertical alignment of the curriculum. Tim indicated that the intent of only sending a handful of teachers to the workshop led by Lucy Calkins was that those teachers would return
to their schools and “spread their knowledge” to the other teachers in the building. Without district-supported opportunities to collaborate, this knowledge spreading did not occur.

**Discussion of the Findings in Relation to the Theoretical Framework**

The theoretical framework for this study was the theory of teacher self-efficacy, which emerged from Bandura’s work on self-efficacy. Bandura’s theory postulates that the effort people put into something is influenced by the anticipated effect of those efforts. Guskey and Passaro (1994) applied that theory to teachers and examined the influence of teachers’ beliefs about their ability to affect student learning. Cherniss (1993) further expanded upon teacher self-efficacy in delineating three domains of personal efficacy, which explain how self-efficacy is enacted in educational settings. Two of those domains, task efficacy and interpersonal efficacy, were relevant to this study of how teachers experienced the implementation of a district-mandated curriculum.

**Task efficacy.** A. Hoy and Spero (2005) claimed that teacher self-efficacy is formed early in a teacher’s career and is relatively stable, but other research has determined that efficacy can be context specific and susceptible to influence (Edwards, Green, Lyons, Rogers, & Swords, 1998; Fritz, Miller-Heyl, Kreutzer, & MacPhee, 1995; Ross & Bruce, 2007). The assertion that self-efficacy is content specific is supported by research on task efficacy (Cherniss, 1993), defined as teachers’ confidence in their own ability to use instructional strategies effectively. In this study, the specificity of task efficacy is illustrated by Tim, who consistently stated that he “struggled” to teach writing and that writing was his “weakest area.” But Tim did not consider himself a poor teacher overall; he stated that he was much better at teaching other content areas, such as math and science.
As teachers attempted to implement the UOS curriculum, many noted changes in how effective they felt. This finding supported previous research, which claimed that self-efficacy is susceptible to influence (Edwards, Green, Lyons, Rogers, & Swords, 1998; Fritz, Miller-Heyl, Kreutzer, & MacPhee, 1995; Ross & Bruce, 2007). Several examples of variations in self-efficacy emerged from discussions with the teachers about their efforts to implement the UOS curriculum. Again, Tim serves as a strong example. In explaining himself as a teacher of writing, Tim said it was “his weakest area,” his consistent response throughout the interview. He did, however, express an ebb and flow in his efficacy that correlated with his familiarity with curricular materials. Prior to the adoption of UOS, Tim said he “second-guessed” himself a lot, but that as he “taught along it got better, my teaching got better.” During the first year of the UOS curriculum, Tim stated that he caused his students to “come out weaker.” As Tim became more familiar with the UOS materials, he began to adapt them to his own teaching style and “became more effective.” Lexi and Melinda also described variations in their self-efficacy that aligned with stages of the UOS implementation. Lexi, who had always defined herself as a strong teacher of writing, began to be “always kind of down on myself.” She felt she dropped from “an 8” on a self-efficacy scale to “maybe a 6 or 7.” Melinda said that before the UOS curriculum, “I did what I could do best with what I knew at that time.” Although she felt effective then and “never once doubted myself,” in retrospect she realized she was “definitely not” an effective teacher of writing. As she learned more about the role of conferencing in the UOS curriculum and implemented conferencing with her own students, Melinda felt her efficacy improved.

**Interpersonal efficacy.** Cherniss (1993) defined interpersonal efficacy as being skilled at engaging students, motivating them to value education and to put forth the necessary effort to
succeed. In this study, Tim, Rachel, and Lexi serve as examples of teachers who attributed the effectiveness of their teaching to their own ability to motivate students. Interestingly, each varied in how his or her sense of interpersonal efficacy was affected by the UOS adoption.

Before the district adopted the UOS curriculum, Tim relied primarily on telling stories about his own experiences to engage students in writing. He connected efficacy to relationship building: “the more personable you make it, the easier it is for the students to write.” Although he did not feel very effective as a writing teacher, he felt much less effective when his primary avenue for engaging students was replaced with the narratives included in the UOS curriculum. Tim “just didn’t feel comfortable” using the scripted narratives and only began to feel a rise in efficacy once he started substituting his own stories for the UOS narratives.

Rachel also attributed a lot of her teaching ability to interpersonal efficacy: “Part of it was just me. I could just read a piece of their writing and give feedback and know how to stretch them….get them to understand that they're capable of [writing well].” When the district mandated the shift to the UOS assessments, Rachel faltered. She felt that she no longer knew what to tell students to work on because “they need to work on everything.” Rachel stated that she did not “see the growth in writing that I used to see.” As a result, Rachel felt her ability to motivate students to put forth effort declined and said that she was a “better writing teacher prior to the program.”

Lexi also felt that she was good at engaging and motivating students prior to the UOS adoption. She stated that most of her students enjoyed writing and she was even able to convince reluctant writers that “they should pretend to like it because they knew I loved it so much.” Lexi indicated that her students didn’t seem to love writing as much during the first few years she used UOS materials. She attributed students’ lack of engagement with the writing to a drop in
her own ability to motivate them. She wondered if her stress and unfamiliarity with the program was reflected in how she taught it and “so maybe I didn’t seem as fun.”

**Discussion of the Findings in Relation to Current Literature**

This study explored the experiences of teachers as they implemented a district-mandated writing curriculum. The findings from this study strongly aligned with existing research related to writing instruction, teacher self-efficacy, and educational power structures and curricular adoptions. This section details how the findings support existing research, as well as areas where the findings reveal interesting discrepancies between existing research and the experiences of participants in this study.

**Writing instruction.** Research indicates that the most effective instruction occurs when teachers use their understandings of students’ needs to select and combine materials (Armor et al., 1976; Barrs, 1983; Bond & Dykstra, 1967; Cutler & Graham, 2008; Duffy & Hoffman, 1999; Ede, 2006; Pearson, 1997; Stahl & Miller, 1989). Before their district adopted the UOS curriculum, the teachers at Oak Creek had been free to use their own professional judgment in selecting materials to support writing instruction. Participants indicated that they used resources provided by the district, such as Writer’s Express, 6 + 1 Traits, and the Simple Six, as the starting point, supplementing them with other materials as they saw fit. When the district adopted the UOS program, administrators communicated that teachers were to implement the curriculum with fidelity, going so far as to dictate the number of minutes per day that teachers were to spend using the materials. This led some of the participants to feel that they had less ability to meet the needs of their students. All of the participants indicated the importance of preparing students to write for purposes beyond their current classroom. These concerns reflect the intersecting domains Ball and Cohen (1996) identified as factors that teachers consider when selecting how
to implement curriculum. In this study, participants paid particular attention to two of those domains: students’ needs and abilities and community.

Since the No Child Left Behind Act of 2011, students’ performance on standardized tests has been instrumental in determining a school’s eligibility for federal funding (Au, 2011; No Child Left Behind [NCLB], 2002; Smith & Kovacs, 2011; Srikantaiah, 2009). Because most standardized tests include a writing component, schools have been under increased pressure to provide high-quality writing instruction. Grade-level curriculum is determined by state standards, but as Hamilton, Stecher, and Yuan (2008) noted, the high-stakes nature of standardized testing and the lack of alignment between state standards and the tests have caused teachers to rely on the tests to inform practice. Oak Creek was not immune from those pressures. Julia worried that UOS strategies did not transfer to the tasks required on the Indiana Statewide Testing for Educational Progress (ISTEP). She was specifically concerned that the UOS emphasis on revising over successive sessions did not prepare students for the ISTEP task of producing a final draft in a single timed session. Abby also indicated a mismatch between the UOS materials and ISTEP, but her concern was with assessment. Abby stated that the UOS rubrics did not align with the state standards and were not helpful to her as a grading tool. All participants noted that it was necessary to supplement the UOS materials in order to help their students successfully respond to a test prompt.

Writing workshop approach. One of the prominent themes that emerged through Lexi’s interview was that prior experience with the writing workshop approach eased implementation of the UOS curriculum. Due to her experiences with the National Writing Project, Lexi had extensive exposure with writing conferences and viewed the UOS curriculum as a natural extension of what she was already doing. Lexi suggested that prior to introducing UOS materials
to teachers, they first be trained in writing workshop. Hawkins (2016) suggested that when conferencing with students, teachers often default into the role of “primary-knower,” speaking an average of four times more than the student. Melinda stated that this was how she enacted writing conferences prior to being trained in the UOS curriculum. She had been exposed to the idea of writer’s conferences, but she had viewed them as an opportunity for the teacher to fix the student’s writing. After becoming familiar with the UOS philosophy, Melinda used writing conferences to engage students as writers, supporting their thoughtful analysis of their work and helping them to identify and work on areas of weakness. Rachel struggled to relinquish the role of primary knower. When discussing her own efficacy as a teacher, Rachel attributed the growth she saw in her students’ writing to her own ability to “just read a piece of their writing and give feedback and know how to stretch them.” As she transitioned to the UOS materials, Rachel recognized that the program’s philosophy required a shift to student-led conferences, but she felt that students were not capable of identifying worthwhile goals for themselves. As a result, Rachel felt caught between enacting a district’s mandated program that she found ineffective or “breaking the rules” to employ strategies that she found to be more effective.

Although Lexi initially embraced the UOS curriculum as supportive of her own teaching philosophy, she expressed concern that aspects of the program negatively changed the dynamics in her class. Prior to implementing UOS, Lexi’s classroom had what she described as a relaxed atmosphere that opened up space for students to contribute to most lessons. The time constraint and pacing of the UOS lessons left little room for Lexi’s students to verbally share their own thoughts during her presentations. The tension between the climate Lexi had established and the expectations of the curriculum caused frustration for Lexi and her students. She eventually reverted to the higher rate of student participation because she found it worked better for her and
her students. Lexi’s struggle to maintain a high level of student engagement in her lessons further supports Ball and Cohen’s (1996) finding that teachers make instructional decisions based on competing factors. In this case, Lexi had to balance her desired class environment with district mandates.

**Scripted curriculum.** Research on scripted curricula indicates that scripts have the potential to serve as professional development for teachers as they enact a new curriculum (Atwell, 2002; Ball & Cohen, 1996; Fang et al., 2004; Reeves, 2010; Valencia et al., 2006), but cautions that strict adherence to scripts can constrain teachers’ decision making (Fang et al., 2004). Both effects were noted in this study.

Abby expressed initial resistance to using a script: “I’ve always interpreted, [textbook authors] thought the program taught the kids rather than the teacher teaching the children, and I can’t operate on being the program, I have to operate on being the teacher.” She was also frustrated with the way the program was introduced and the lack of the support from the district. Despite these issues, Abby stated that she was thankful for the UOS curriculum because it made her a better teacher. Abby described long conversations with her teaching partner, during which they interpreted the philosophy of the UOS lessons, translating it to fit the children in their classes. This supports Reeves’s (2010) finding that scripts may serve as an external expert as teachers grapple with new curriculum. As was the case in Reeves’s study, Abby and her colleague did not blindly follow the curriculum, but instead interacted with the script, forming their own understandings about the lesson goals and enacting the materials in a way that made sense for their students. Abby noted that the UOS curriculum is not “scripted like I would have imagined in the past….So much of it’s philosophy.” In this way, UOS differs significantly from Corrective Reading, the scripted instruction used in Reeves’s study. The Corrective Reading
program is based on behaviorist principles, incorporating repetition and incremental skill building (Reeves, 2010), whereas UOS encourages a process approach to writing and empowers students as decision makers. The difference in underlying principles may have contributed to Abby’s view of the UOS materials as an external expert and eased her resistance to it.

Rachel’s experience with the UOS curriculum was more aligned with research by Fang et al. (2004), which found that scripted materials can constrain a teacher’s decision making. Rachel described herself as someone concerned with following the rules, and in the case of the UOS implementation, she perceived the rules to be that teachers “cannot stray off course, and you have to follow the lessons as they are in progress as they are.” Rachel described feeling handcuffed, as if she had her hands tied behind her back. When she followed the lessons as written, she saw less growth in her students’ writing ability. Rather than adapting the materials, Rachel departed from them.

**Teacher self-efficacy.** The body of research describing the concept of teacher self-efficacy indicates that teachers who are high in self-efficacy tend to have students who are high achieving (Goddard, Hoy, & Woolfolk Hoy, 2004; Ross, 1998; Ross & Bruce, 2007). Furthermore, teachers who are high in self-efficacy are more likely to implement reform-based models of teaching (Czernaik, 1990) and spend increased time teaching subject matter (Riggs, 1995; Riggs & Enochs, 1990). Correlations between self-efficacy and teacher behaviors also emerged in this study.

The effect of self-efficacy on teaching practices was particularly evident with Tim. In response to a question regarding how much instructional time he devoted to writing, Tim replied, “Honestly it's the first thing that I avoid because it's my biggest weakness.” During his interview, Tim repeatedly indicated low levels of self-efficacy related to writing instruction. As he found
himself struggling to implement the UOS materials, he said he “didn’t think I was effective at all” and described a 60 percent reduction in the number of days per week that he taught writing.

Although Rachel also displayed lowered self-efficacy and a reduction in instructional time spent on writing during the UOS implementation, it is less clear whether the two factors were causally linked. Rachel attributed her failure to conform to the district’s required time on task for UOS to the “time constraints of the program.” She felt that fitting in a 40-minute lesson was difficult given the other demands on instructional time and that in reality the UOS lessons required more than the allotted time:

There’s no way you could do the whole lesson [as is] in 40 minutes, and if you wanted to do it justice, and get the kids to truly understand all the different parts within the lesson, one lesson could be two or three days, which is great except then Unit 1 went months.

Another significant difference between Tim and Rachel is how they defined their ability to teach writing prior to the UOS curriculum. While Tim consistently defined himself as low in efficacy, Rachel had viewed herself as highly effective before the district adopted UOS. In discussing her drop in self-efficacy, Rachel blamed the materials, stating that they did not always fit her class and often did not spend “enough time on some of the basic writing that students just are lacking.” Given that Rachel’s drop in self-efficacy coincided with a change in instructional materials and supporting commentary from other teachers regarding the time constraints of the UOS lessons, Rachel’s avoidance may have been due to situational factors rather than her own decreased self-efficacy.

Overall, findings from this study seem to support prior studies that indicated that self-efficacy can predict the likelihood that a teacher would implement new projects successfully (Tschannen-Moran & Hoy, 2001) and the amount of time teachers will spend teaching subject
matter (Riggs, 1995; Riggs & Enochs, 1990). This study does find that difficulties related to the curriculum may complicate the relationship between self-efficacy and the time spent teaching subject matter.

**Educational power structures and curricular adoption.** The education of children is of vital importance to a country’s future; therefore, there are many stakeholders in educational decision making. These stakeholders influence policy at the local, state, and federal levels and have increasingly come to base policy decisions on data provided by standardized testing. While the states are given governance over schools, the federal government often exerts power through its purse strings, as was the case in 2001 when the No Child Left Behind Act elevated mandated standardized testing and standards-based education as a component for determining federal funding (Au, 2011; No Child Left Behind [NCLB], 2002; Smith & Kovacs, 2011; Srikantaiah, 2009). Linking student performance on standardized tests to federal funding has increased pressure on districts to ensure students receive high-quality writing instruction, but as demonstrated by the theory of loosely coupled systems (Weick, 1976), district-mandated changes do not necessarily produce the desired outcome in individual classrooms. The district in this study sought to standardize writing instruction through the adoption of a scripted writing curriculum, but the findings of this study support Weick’s claims that the characteristics of localized identities, in this case the traits of the teachers and students at Oak Creek, prevent a standard outcome.

One reason that the adoption of the UOS curriculum at Oak Creek may not have fully reached the potential the district had hoped for was the district’s insistence that teachers implement the program with fidelity. Participants defined fidelity to mean anything from time on task to adapting the materials while remaining faithful to the overall program philosophy to
reading the lessons verbatim. Most of the participants seemed to interpret the district mandate as reading the lessons verbatim, but, as previously discussed, communications from the district were unclear in that regard. As Fullan and Pomfret (1977) explained, fidelity refers to the extent to which implementation matches the intent. Several factors affected the degree of fidelity with which participants in this study implemented the UOS program.

Fidelity can be influenced by the amount of input teachers have in making curricular decisions (Datnow & Castellano, 2000; Fullan & Pomfret, 1977). Most of the participants indicated that they felt excluded from the decision to adopt the UOS materials. Even Rachel and Lexi, who served on the school’s writing committee at the time of the adoption, felt left out of the final decision. While Julia stated that she trusted school administrators to provide her with the best curriculum to meet her students’ needs, that trust did not prevent her from “tweaking” the curriculum to address the “individuality and uniqueness of every child” in her class. Julia’s approach is supported by conventional wisdom that teachers must apply their own knowledge of the students and learning community to adapt curriculum (Fang et al., 2004; Frank, Zhao, Penuel, Ellefson, & Porter, 2011; Fullan & Pomfret, 1977; McLaughlin, 1976; Pearson, 1996).

Julia also supplemented the UOS materials to meet curricular concerns, as did Rachel. Julia and Rachel both suggested that the UOS materials failed to address foundational aspects of writing that students needed to be successful and cited student deficits as evidence. Narrowed curriculum has been noted as a negative outcome of standardizing education (Au, 2011, 2013; Mathison, 1991; Rubin, 2011; Smith & Kovacs, 2011; Srikantaiah, 2009), so it is possible that the UOS curriculum did not adequately address the curricular elements mentioned by the participants. The method of implementation chosen by the district may have also played a role in creating the gaps in curriculum. The district in this study adopted the UOS curriculum
simultaneously across all grade levels. This meant that students in each grade level entered the curriculum without the instruction previous grade levels would have provided. As noted by Goldsmith, Mark, and Kantrov (2000), implementation strategies should vary according to the particular curriculum. In certain situations grade-by-grade implementation is helpful to allow both teachers and students to develop prerequisite skills. The Units of Study curriculum, with its heavy underpinnings of philosophy, may be one such situation.

Spillane (1999) examined issues that emerge when curricular decisions challenge teachers’ deeply held beliefs about the roles of students and teacher in the classroom. Spillane suggested that teachers begin to translate theory into practice in the “zones of enactment” and that during this process it is important that teachers have time to check their translations through conversations with their peers. Without opportunities to discuss their evolving understandings with colleagues, teachers have “no reason to question their particular enactment of” the curriculum. Spillane further contended that teachers may enact superficial changes in practice, fully believing that they are following the curriculum’s intent. Many of the participants indicated that they often adapted the UOS materials and found themselves questioning whether they were doing it correctly. Many stated that they craved opportunities to discuss what they were doing with their colleagues, but that the district failed to provide time for such conversation in training sessions or at other times. Without those conversations, it is difficult for teachers to know whether they are truly fulfilling a curriculum’s intent or merely enacting one of the superficial changes described by Spillane.

Overall, this study supported existing literature regarding a link between the role of teachers in the decision to adopt curriculum and the fidelity with which teachers implement the curriculum. Familiarity with the foundational aspects of the program also seemed to influence
the likelihood that teachers would implement the materials with fidelity, although without opportunities to collaborate it was hard for teachers to discern whether they were meeting the intended outcomes of the curriculum.

**Implications for Practice**

Districts seeking to adopt the Lucy Calkins Units of Study curriculum could benefit from the lessons learned at Oak Creek Elementary. Some of the difficulties faced by the teachers at Oak Creek were due to the timeline the district followed for the adoption. Rather than simultaneously adopting the curriculum at all levels, a phased adoption would allow students to build the requisite skills to succeed as they advance grade levels. Goldsmith et al. (2000) cautioned that such grade-by-grade implementation means that students who are in the initial implementation cohort will progress through the system as perpetual guinea pigs, as each successive teacher uses the material for the first time. This can be partially counteracted by inviting the teachers who participate in the earliest phases of adoption to serve as mentors for those who come after. Another approach would be to use a form of looping, where the previous grade-level teacher partners with the next grade level to co-teach the UOS curriculum.

By far the largest concern raised by this study’s participants was the lack of training teachers received before and during the implementation of the materials. Teachers need time to digest complex curricula, especially when the curriculum requires a substantial shift in their own teaching philosophy. For this reason, it is important that districts carefully consider how to best support teachers as they move through the adoption process. While disseminating information is a necessary part of introducing new curriculum to teachers, trainings should not be limited to one-way presentations of materials. It would be most helpful to teachers if the district held overview sessions prior to implementing any materials, during which the program’s philosophy,
scope and sequence, and unit structure would be explained. Following this overview session, teachers could review the materials at their leisure and return for follow-up sessions that focus on topics determined by the teachers.

The teachers in this study also indicated the importance of collaboration to their ability to enact new curriculum. Professional learning communities could be an effective way to involve teachers in the materials before implementation. The UOS curriculum comes with several volumes of material meant to impart philosophical underpinnings to teachers. Whereas Julia, as a new teacher in the district, had those materials thrust at her after the school year was already underway, a better model would be to use those materials as the basis for professional learning community topics during the year prior to implementation. Once implementation begins, it is important to continue to provide opportunities for teachers to discuss the materials and share their concerns in a low-risk environment. This would allow teachers to support one another as they collaborate to remove roadblocks to effective use of the materials in their own classrooms.

As Julia’s experience illustrates, ongoing training opportunities are necessary as new teachers join the district or switch schools or grade levels within the district. If districts want the curriculum to be effective for students, these new teachers need just as much time to absorb and process the material as was given to teachers during the initial implementation, so it may be necessary to think creatively about how to support new teachers’ induction into the school. One suggestion would be to pair them with a grade-level peer, who would co-teach the UOS curriculum, model best practices, and provide feedback as the new teacher gradually takes the lead.

The teachers in this study struggled to reconcile district mandates with the needs of students in their classes. While districts must make large-scale decisions about curriculum,
administrators would be wise to take teachers’ professional expertise into consideration. Teachers must be able to adapt the curriculum if they are to effectively differentiate for student needs and meet other district requirements. Mandates that require teachers to maintain a standardized pace or follow a script as written do not take into account the individual needs of students, the other demands on instructional time, nor the wealth of professional knowledge possessed by the teacher. Teachers should be encouraged to adapt the pace of instruction to ensure student proficiency. This may mean combining or excluding lessons that target skills the students already possess or spending extra time on areas where students struggle. To avoid overwhelming teachers, districts must also consider how the new curriculum fits within the school or district’s existing framework and offer strategies for fitting new demands into an already overcrowded instructional day. Finally, teachers should be encouraged to internalize aspects of the UOS philosophy to inform their own instructional decision making, rather than blindly following the material.

As districts consider new curricular adoptions, it is also important to consider the historical context of reform initiatives in the district. In this study, participants suffered from reform fatigue due to a barrage of curricular changes that were not supported nor sustained by the district beyond their initial introduction. The teachers in this study expressed the desire to improve their practice and were receptive to materials that would help them further their expertise. Their resistance to the Units of Study curriculum stemmed from past failures on the part of the district to support sustained change and the current failure to explain how this change was important and different. Districts that wish to introduce new curricula should be open with teachers about how the new materials support or differ from what they are already doing and
allow opportunities for collaborative discussions on how new materials can dovetail with and build upon past practices.

**Implications for Future Research**

While this study was able to identify several factors that impeded the effective implementation of the Units of Study curriculum at the subject school, it would be helpful to study a school that has experienced a more successful implementation. Such a study could identify specific strategies that teachers found helpful and make recommendations to districts considering adopting the program. It would also be beneficial to take a deeper look into the challenges teachers face during the first year of implementation. An ethnographic approach, in which a researcher becomes immersed in the enactment of the curriculum within the school setting, could provide an understanding of supports and behaviors that affect the adoption.

**Limitations of the Current Study**

The current study was able to provide an in-depth look at how six teachers at Oak Creek experienced the implementation of a district-mandated scripted writing curriculum at their school. While the small sample size impedes the ability to generalize findings, the intent of interpretative phenomenological analysis is not to generalize, but to collect rich, detailed information about participants’ experiences. As such, this study, through the use of semistructured interviews, produced much data regarding teachers’ experiences with the Units of Study curriculum.

Whenever a researcher seeks to glean meaning from the words of another, the risk of misinterpretation exists. To minimize that risk, this study employed member checking and debriefing. Participants were presented with the typed transcript of their interviews and asked to clarify or correct any areas of concern. Members were also invited to provide additional thoughts.
during a third interview. As the data were analyzed for themes, the researcher used an independent auditor to check the legitimacy of the themes emerging from the raw data. The independent auditor found the findings of this study grew logically from the collected data.

Conclusion

The current study examined how teachers experienced the district-mandated adoption of a scripted writing curriculum. The study began after the researcher received a distress call from a veteran teacher whose district had adopted the Units of Study curriculum. The teacher’s frustrations in trying to merge the district’s mandates related to pacing and fidelity with her own professional understandings about student needs raised questions about the nature of curricular decision making and teacher efficacy. To investigate these issues, the researcher chose to employ interpretative phenomenological analysis. IPA allowed for a deep understanding of teachers’ experiences during the implementation of the curriculum. Participants were able to share rich details about their own experiences during semistructured interviews. Complex themes about the challenges of implementing district-mandated curricula emerged from these stories.

The findings of this study support prior research related to writing instruction, teacher self-efficacy, and educational power structures and curricular adoptions. Participants found it necessary to adapt the scripted curriculum and to supplement it with other resources to meet the particular needs of the students in their classes. District mandates to adhere to pacing schedules with fidelity or to follow lessons as written frustrated teachers’ ability to meet students’ needs. In addition to requiring flexibility in how they implement the materials, teachers also indicated a strong desire for ongoing professional development and opportunities for collaboration to help them navigate issues that arise.
Overall, the study findings provide insights into the challenges districts may face when adopting a new curriculum. While there is intense pressure for schools to provide high-quality instruction, adopting a one-size-fits-all approach fails to take into consideration the complexity of today’s educational system. Students come to their teachers varying widely in terms of ability, background knowledge, motivation, interests, family support, socioeconomic status, and access to technology. Students count on having teachers who are capable of understanding and addressing these differences while helping them attain the growth necessary to succeed, not just in the next grade level or on the state standardized test, but as citizens of the community and the world. To succeed in that endeavor, teachers need all the support they can get. In the words of one of this study’s participants:

Why would [districts] not let [teachers] take the best of many programs, put it together and let them be creative with various programs to help the students be successful in writing, instead of one because I don’t think there’s one program out there that addresses every single skill that a student may need. There’s always some supplementation needed.
References


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Appendix A

Recruitment Letter

July 21, 2017

[teacher’s name]
Oak Creek School
[School Address]

Re: Units of Study Implementation Study / Higgs-Coulthard

Dear [teacher’s name]:

I am writing to let you know about an opportunity to participate in a research study about the Lucy Calkins Units of Study scripted writing curriculum. This study is being conducted by Katherine Higgs-Coulthard through Northeastern University in Boston, Massachusetts. This study will explore the experiences of teachers as they worked to implement district-wide adoption of the Units of Study materials.

I am contacting you for this study because your school district recently adopted the Units of Study materials. Permission to conduct the study has been granted by [name], Assistant Superintendent of [school district name] and [name], Principal of [school name]. Participation in this study is completely voluntary and would involve a brief in-person interview. Participants’ names will be kept in confidence and no information that would identify you as a participant will be shared.

Please reply to this email to indicate whether it is permissible to contact you with further information related to this study. Agreement to be contacted or a request for more information does not obligate you to participate in any study. Upon your response, a follow-up phone call will be scheduled to further explain the study and you will be given the opportunity to participate or opt out. You may also request that your name be removed from the potential list of participants and no further contact will be made.

Thank you for considering this research opportunity.

Best,

Katherine Higgs-Coulthard, Doctoral Candidate
Northeastern University, Boston, MA
higgs-coulthard.k@husky.neu.edu
(574) 220-8798
Appendix B

Informed Consent

Northeastern University, College of Professional Studies.
Names of Investigators: Dr. Sara Ewell and Katherine Higgs-Coulthard
Title of Study: Navigating the Gap between Scripted Writing Curricula and Teacher Sense of Self-Efficacy: An Interpretative Phenomenological Analysis of Teachers’ Implementation of Scripted Materials in Their Classrooms.

We are inviting you to take part in a research study. This form will tell you about the study, but the researcher will explain it to you first. You may ask this person any questions that you have.

Informed Consent to Participate in a Research Study

When you are ready to make a decision, you may tell the researcher if you want to participate or not. You do not have to participate if you do not want to. If you decide to participate, the researcher will ask you to sign this statement and will give you a copy to keep.

We are asking you to take part in this study because your school has recently adopted the Lucy Calkins Units of Study writing curriculum.

Why am I being asked to take part in this research study?

Why is the research study being done?

The purpose of this research is to gain insight into the effects of district-mandated adoption of scripted writing curricula on elementary teachers.
What will I be asked to do?

If you decide to take part in this study, we will ask you to participate in one 60-minute one-on-one interview with the researcher. The interview questions will be open-ended and will focus on your experiences as you implemented the Units of Study materials. The goal of the interview will be to provide space for you to describe what it was like for you as a teacher to integrate the materials into your classroom. Questions will focus on how your role as teacher and how your feelings about yourself as a teacher of writing have changed since the implementation of the program.

You will also be given the opportunity to review a transcript of the interview and to comment on its accuracy. At that time, you may request the removal or rephrasing of any inaccurate or potentially damaging statements.

You will also be provided with a transcript of the interview and given one week to review it. Should you note statements that are potentially harmful to yourself or others, you may request their exclusion from the study or provide clarification.

Where will this take place and how much of my time will it take?

You will be interviewed in your classroom, your home, or at a time and place that is convenient for you. The interview will take about one hour.

Will there be any risk or discomfort to me?

There are no foreseeable risks or discomfort attached to your participation in this study.

Who will see the information about me?

You will not be identified as having been a part in this study. Only the researchers on this study will have access to information related to your identity. No reports or publications will use information that can identify you or any individual in any way as being of this project. Additionally, the name of your school and district will not be included in reports or publications.
The answers you provide during the interview may be used in whole or in part within the study’s reports and associated publications. If your answers include any identifying information, the portion that could be associated with you will be removed.

Will I benefit by this research?

Although there is no direct benefit for you, the opportunity to share your experience with others may be personally rewarding. The information obtained through this study may help other teachers and school personnel who may be in the process of or considering implementation of similar scripted programs.

To ensure the protection of your personal information, you will be assigned a pseudonym and the notes and recordings related to your interview will be stored under that pseudonym with no identifying information. All data (notes, recordings, transcripts, etc.) will be stored in password-protected files accessible only to the researcher. Northeastern University requires that all data be maintained for three years following the conclusion of the study. After that three year span, the data will be destroyed.

In rare instances, authorized people may request to see research information about you and other people in this study. This is done only to ensure that the research is done properly. We would only permit people who are authorized by organizations such as the Northeastern University Institutional Review Board to see this information.

What will happen if I suffer any harm from this research?

There are no foreseeable risks associated with your participation in this study. No special arrangements will be made for compensation or for payment for treatment solely because of my participation in this research.

Can I stop my participation in this study?

Your participation in this research is completely voluntary. You do not have to participate if you do not want to and you can refuse to answer any question. Even if you begin the study, you may quit at any time prior to the conclusion of data collection and the onset of data analysis. If you do not participate or if you decide to quit, you will not lose any rights, benefits, or services that you would otherwise have (as a student, employee, etc).
Who can I contact if I have questions or problems?

If you have any questions about this study, please feel free to contact Katherine Higgs-Coulthard, the person mainly responsible for the research. Katherine’s email address is higgs-coulthard.k@husky.neu.edu and her cell phone number is (xxx) xxx-xxxx. You can also contact Dr. Sara Ewell, the Principal Investigator through Northeastern University. Dr. Ewell may be reached via email at s.ewell@neu.edu

Who can I contact about my rights as a participant?

If you have any questions about your rights in this research, you may contact Nan C. Regina, Director, Human Subject Research Protection, Mail Stop: 560-177, 360 Huntington Avenue, Northeastern University, Boston, MA 02115. Tel: 617.373.4588, Email: n.regina@neu.edu. You may call anonymously if you wish.

Will I be paid for my participation?

You will be given a $20 gift certificate to your choice of Barnes and Noble or Starbucks following the interview.

Will it cost me anything to participate?

There is no cost to you to participate.

Is there anything else I need to know?

Permission to conduct this study has been granted by the school and district administration.
I agree to take part in this research.

____________________________________________ __________________________
Signature of person agreeing to take part Date

____________________________________________
Printed name of person above

____________________________________________ __________________________
Signature of person who explained the study to the participant above and obtained consent Date

__________________________________________________________
Printed name of person above
Appendix C

Interview Protocol

Interview 1 (Approximately 30 minutes)

The purpose of this interview is to establish rapport, answer questions about informed consent, and gather background information.

Informed Consent Script:

Thank you for agreeing to meet with me. Have you had a chance to look at the Informed Consent Document that I emailed you? I’d like to answer any questions you may have. Can I answer any questions at this time?

[Answer participants’ questions.]

Would you like to participate in the study?

[If not, thank them for their time and for considering the study. If so, invite them to sign the Informed Consent Document whether they are comfortable at this time. If they would like more time to think about it, arrange a time to meet to collect the document and background information.]

If participant signs the document, continue with the following background questions.

Background information:

What degree do you hold? Licensing area(s)?

What training specific to writing instruction have you received?

How long have you been teaching?

What grade levels have you taught?

How many years and in what capacities have you taught writing?

Interview 2: Semistructured Interview (Approximately 60 minutes)

Research Goal: The goal of this research is to explore how the Lucy Calkins Units of Study curriculum materials affect teachers’ feelings and beliefs about their own efficacy as teachers of writing and to provide insights for administrators who may be considering adopting a scripted writing curriculum.

Primary Research Question:
How do elementary teachers experience the required implementation of scripted writing materials in their classrooms?

**Possible Interview Questions**

Due to the nature of the semi-structured, responsive interview, the questions listed below are guidelines. The actual questions asked will be determined as the interview proceeds.

**Specific to Study:**

**BEFORE IMPLEMENTATION**

Core question: Let’s talk a little bit about teaching writing before the Units of Study program. What can you tell me about what that looked like? How did you feel about yourself as a teacher of writing?

**Probing Questions:**

- What did writing look like in your classroom?
- What did you do to prepare for teaching writing?
- How did you feel about yourself as a teacher of writing? What were your greatest strengths? What did you find challenging?
- What materials, if any, did you use to support writing instruction?
- How do you feel your writing instruction affected your students?
- What was the climate like in your school related to writing instruction?

**TRANSITIONAL**

Core question: Let’s talk a little bit about teaching writing during the initial implementation of the Units of Study program. What can you tell me about what that looked like? Were there any ways your role as teacher changed? Was there anything that changed how you felt about yourself as a teacher of writing?

**Probing Questions:**

- [School district name] adopted the Units of Study curriculum in Grades K-5 in the 2013-14 school year. How did that come about?
- How was the Units of Study program introduced to you?
- What was it like for you as your district and school implemented the program?
- What changes, if any, did you notice in the way you prepared to teach lessons that first year?
- Can you describe how the way you taught was different during that first year of implementation?
- What did writing look like in your classroom?
• How did you feel about yourself as a teacher of writing? What were your greatest strengths? What did you find challenging?
• What materials, if any, did you use to support writing instruction?
• How do you feel your writing instruction affected your students?
• What was the climate like in your school related to writing instruction?

RECENT

Core Question: Let’s talk a little bit about teaching writing in more recent years. What can you tell me about how that looks now? Has your role as teacher changed since that initial implementation? Has how you feel about yourself as a teacher of writing changed?

Probing Questions:

• Since its implementation, how has your understanding about using the Units of Study curriculum changed?
• How have your school or district’s expectations for the use of the curriculum changed?
• What was it like for you as your district and school continued to implement the program?
• What changes, if any, did you notice in the way you prepared to teach lessons after that first year?
• Can you describe how the way you taught was different after that first year of implementation?
• What does writing look like now in your classroom?
• How do you feel about yourself as a teacher of writing now? What are your greatest strengths? What do you find challenging?
• What materials, if any, do you use to support writing instruction?
• How do you feel your writing instruction affects your students?
• What is the current climate like in your school related to writing instruction?

OVERARCHING

• What have you noticed about yourself as a teacher of writing throughout the process of implementing the Units of Study?
• How has the Units of Study curriculum affected your view of yourself as a teacher of writing?
• How has the Units of Study curriculum affected your ability to be an effective teacher?

Interview 3: Follow-up Interview (Approximately 30 minutes)

The purpose of this interview is to follow-up on participant answers from Interviews 1 & 2. While the actual questions may vary depending on the individual answers given by the participants, all questions will be related to the questions submitted for Interview 2.
Potential questions include:

- Can you tell me more about [a specific experience participant described during second interview]?
- In our second interview, you mentioned [specific reference from second interview], can you talk a little more about the effect of that on how you felt about yourself as a teacher?
- Since our last conversation, have you thought of anything you’d like to add about your experience with the Units of Study curriculum?
Appendix D

NIH Certificate

Certificate of Completion

The National Institutes of Health (NIH) Office of Extramural Research certifies that Katherine Higgs-Coulthard successfully completed the NIH Web-based training course "Protecting Human Research Participants".

Date of completion: 04/14/2014

Certification Number: 1446620