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EDUCATORS BAILAN WITH POLICY ET LE POUVOIR IN THE EDUCAÇÃO OF
MULTICULTURAL AND MULTILINGUAL LEARNERS (WIDA ELD STANDARDS
AND THE EDUCATION OF ENGLISH LEARNERS)

A Dissertation Presented

by

FERNANDA MARINHO KRAY

Submitted to the Office of Graduate Studies,
University of Massachusetts Boston,
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

May 2020

Urban Education, Leadership, and Policy Studies Program

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ABSTRACT

EDUCATORS BAILAN WITH POLICY ET LE POUVOIR IN THE EDUCAÇÃO OF MULTICULTURAL AND MULTILINGUAL LEARNERS (WIDA ELD STANDARDS AND THE EDUCATION OF ENGLISH LEARNERS)

May 2020

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The larger frame of this study contributes to the literature that examines how educators negotiate, contest, appropriate, and reconstruct federal and state-level policy in their classrooms. More specifically, the study contributes to the field of language education policy, and in particular to how educators make sense of, and implement, English Language Development (ELD) Standards. I focus on WIDA ELD Standards, as they are currently in use in 42 U.S. states, territories, and federal agencies as well as more than 500 international schools throughout the world. The literature review identifies a problem for standards-based education systems using the 2012 WIDA Standards Framework: various reports show that they are not sufficiently user-friendly in their design to be meaningfully operationalized by educators designing curriculum in practice, leaving many to either ignore them altogether or

to ask for additional help from standards-setting organizations and state departments of education, and requiring a locally-created “extra layer” to be used. This study focuses on how one such locally-created “extra-layer,” the Next Generation English-as-a-Second-Language Project and its Collaboration Tool, might facilitate processes to promote the simultaneous development of language and content, a central aspect of the WIDA ELD standards. I approach this study through a critical democratic theoretical framework coupled with a conceptual framework that sees policy as a social practice of power. Together, these frameworks open up spaces to consider how educators maneuver power to creatively and intentionally engage with policy in their classrooms.

Findings indicate that educators would feel better supported in operationalizing WIDA ELD standards if they further specified language functions, features, forms, and genres from the context of disciplinary learning, and if they were presented in a more streamlined, actionable, and user-friendly way. Ultimately, the study underscores the importance of developing greater authentic dialogue and genuine democratic practices in policymaking, and underscores the importance of reflective spaces that support educators in unpacking sociocultural, sociohistorical, and sociopolitical aspects of education and the world surrounding it.

Implications of this study can inform policy processes, educator preparation programs, professional development offerings, and the design of future language development standards and related tools.

Keywords: bilingual/bicultural, English Learners, WIDA, English language development standards, English language proficiency standards, academic English, academic

language, educational leadership, policy analysis, educational policy, language education
policy, critical theory, power, politics of education.

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For many years, I was a student of Capoeira Angola, a type of Afro-Brazilian martial art and cultural practice. In Capoeira, a student “plays” for many years before becoming a *mestre* in an apprenticeship system. Here, memory, traditions, ancestors, and tracing communal lineages of resiliency matter. Collective memories and an understanding of roots are essential to those crossing multiple borderlands (thank you, Anzaldúa).

As I consider my multiple lineages – intellectual, cultural, familial, communal, linguistic, academic – I am reminded of Alice Walker’s “In Search of our Mother’s Gardens” (thank you too, Zora). This moment highlights for me the desire to connect, to look up at who came before, to name, and to offer respect as though touching the ground of the *atabaque* (thank you, Mestre Deraldo). Entering this new *roda*, and considering the far-reaching world of creative scholarship, I too search through my own gardens, and honor those who have taught me and held me along the way. What seeds of what flowers have they planted, and which of their fruitful gardens shall continue to flourish as the world moves forward? We pass on the kindness and the knowledge, from one to the next.

This dissertation is not a sole endeavor and I am beholden to many who paved my way here. First and foremost, I am deeply appreciative of the educators who kindly gave their time and energy to this project – in many ways, they are co-authors of this undertaking. In particular, I express my gratitude to Paula Merchant, a beacon of strength and knowledge in our field, and a long-time thinking partner.

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I wish to pay my special regard to communities of educators who regularly coalesce to affirm their own humanity and professionalism in a time when educational institutions are embroiled in neoliberal policies and structures. It is crucial that we continue to work together to dialogue, reflect, and resist superficial materials and methodologies, and instead dive into the deep work of searching for more enduring, personal, and transformative forms of education. For a period of time, the Next Generation ESL Project (NGESL) group became a dynamic, striving, and collective movement focused on developing transformative mechanisms to make sense of policy mandates, cooperatively making meaning around the purpose of education, and developing narratives, processes, and tools that exist within particular contexts but continue to seek to humanize and increase equity and critical spaces for multicultural and multilingual students. I am indebted to all the educators who inquired, dialogued, and reflected on the NGESL: the planning committee, writers, piloting teams, developers, and other participants through professional development sessions or conferences.

There are also friends and colleagues who, in the course of my life, have helped to shape how I think and who I am, and thus subtly contributed to this dissertation. I want to express my deepest gratitude to my undergraduate mentor, Richard Weiner, for inspiration that has lasted a lifetime. Thank you Maria de Lourdes Serpa for your kindness and spirituality, your building of community and mentoring of so many such as myself. I am

grateful as well to a community of friends for the endless conversations and unequivocal support. Sara Niño and Cheryl Wrin deserve special mention and appreciation.

Finally, I come to my family. Sometimes together and sometimes apart, we have crossed multiple lands, languages, and cultures. This is for my grandmother Lucy who used to dance and laugh, but who has now crossed to another place. This is for my grandmother Tera, the great matriarch and uniter of peoples, who holds us all anchored so none are truly lost. Lastly, I dedicate this dissertation to my children, Lily and Emily, and to my warrior mother, who brought me to this land and opened roads for so many to rise.

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PREFACE

Given the results of the 2018 Brazilian elections, I start by looking back, and remembering first that I am a daughter of dictatorship. The current global trend to elect the political right brings a renewed and intensified urgency for communities around the world to discuss, practice, and structure forms of governance and human relationships that aim to be both equitable and grounded in the common good. Thus, the present study is situated in a critical framework that places public education as a central component of the democratic endeavor. It asks how educators negotiate power to appropriate federal and state-level policy in their classrooms. I focus specifically on how educators make sense of the WIDA English Language Development Standards, and I approach this work with both insider and outsider lenses.

As a student: When I first moved from Brazil to the United States, I entered an American public high school and was classified as an undocumented English Learner. My experience was not a pleasant one. In a mixture of bad and good luck, after going back and forth between countries, I completed my senior year in a small alternative American high school that honored students' voices, supported their agency, respected their choices, and implemented many radically democratic practices. In this sense, from a student's perspective, I have experienced both dehumanizing and empowering forms of American education.

At the school and district levels: As an adult, I have been a classroom teacher of English-as-a-Second Language, Spanish, and English Language Arts. As a public-school educator, I endeavored to create experiences for my students that were dialogic, humanizing, culturally-and-linguistically-sustaining, rigorous, and that included more radically

democratic practices, but that was not always possible. Under the growing accountability and surveillance movements, I began to ask if and how critical spaces could exist within traditional structures of public schooling. As one who needed a paycheck to survive, such ambitions were often coopted by the need for bread, shelter, and compliance. I eventually left the classroom as I no longer could teach in a way that was aligned to my pedagogical philosophy. I have also been a coach to content and language specialists working with multicultural and multilingual (MCMLs) students, a member of a school's instructional leadership team, and a program coordinator of an English Language Development Department.

At the state level: I worked as a Professional Learning and Curriculum Coordinator in a state department of education from March 2014 to February 2019, focusing on MCMLs. Even as I worked in these offices, I observed worrisome tensions around decision-making, policy, and power, and the ways different voices were included or excluded from the processes that legitimate and privilege particular discourses, practices, and knowledge(s), largely shaping the allowable spaces of public education. My current study is emblematic of an exploration of such tensions, visible even in the styles with which I write this dissertation.

When working for the state, in many ways, I managed to work on projects that allowed more freedom and creativity than what most of my colleagues were generally granted. For example, I was able to plan the Next Generation ESL Curriculum Project (part of this current study) as a field-based project structured around collaborative and distributive leadership with teachers, directors, and principals from across the state. In another project, I was able to include family and student voices as part of the decision-making and development processes. Yet such windows of progressive opportunity are ephemeral – they

tend to open and close as the wind blows, and with frequent changes in leadership and management styles. As much as possible, one must stealthily maneuver through these efforts to continue to do work that feels student-centered, authentic, meaningful, and ethical. In contrast, the majority of other state work tends to be much more bureaucratic, hierarchical, compliance-driven, and falling in tune with the political bent and ambition of the faces and cloaks of power that can move like the wind. This power is not always stable – it is multiple-sited, it shifts, it dances, and seems to have no final static resting place. As I left my job at the state in 2019, under the Trump administration, pressures related to privatization, surveillance, and market-driven neoliberal policies seemed to be increasing.

At the national/international level: In addition to associations with other organizations at the national level, it is important to note here that I served as a WIDA Board member from 2014-2019, participating in many subcommittees, including Professional Learning, Research, and Standards. As I began Chapter 4 of this dissertation, I started to work for the University of Wisconsin's Center for Educational Research, which houses WIDA, its largest project. Coming in as a senior policy and planning analyst/standards researcher, I was recruited to work with the WIDA standards development team. This does not change but sharpen the focus of my dissertation.

In these various personal and professional settings, I became aware of the vast inequalities that existed between different types of schools; among students of varying statuses based on socioeconomic, racial/ethnic, linguistic, cultural, or other differences; and among those who are granted access or are excluded from joining the conversation that makes policy for public education systems, whether in formal or informal policy communities and networks.

CHAPTER 1 INTRODUCTION

Children Walk about the World

Globally, there are over 258 million migrants living outside their country of birth (United Nations, 2017). International agreements such as the Global Compact for Safe, Orderly, and Regular Migration (UN General Assembly, 2018b) and the Global Compact on Refugees (UN General Assembly, 2018a) have called for countries to include immigrants and refugees in their national education systems. In high-income countries, immigrants make up at least 15% of the student population in half of all schools, and systems must act quickly to accommodate both those who arrive and those who are left behind (UNESCO, 2018).

Multicultural and multilingual students (MCMLs)¹ classified as English Learners (ELs) are among the most diverse across the United States (National Academies of Science, Engineering, and Medicine [NASEM], 2017; Ruiz-de-Velasco & Fix, 2000; Serpa, 2011). MCMLs represent a range of cultural, linguistic, educational, and socioeconomic backgrounds and have many physical, social, emotional, and/or cognitive differences. While MCMLs bring much potential with them, they have been a historically underserved population (Hochschild & Scovronick, 2004; Massachusetts Department of Elementary and

¹ This group of students has been referred to as Limited English Proficient (LEP), English Language Learners (ELLs), English Learners (ELs), Culturally and Linguistically Diverse Learners (CLDLs), Multilingual/Multicultural students (MCMLs), Emergent Bilinguals, and Multilingual Learners (MLs). In this paper, I refer to this group of students as MCMLs. In the field, they are currently referred to most often as ELs.

Secondary Education (MADESE), 2017c; NASEM, 2017; Nieto & Bode, 2011; Ruiz-de-Velasco & Fix, 2000; The Board of Elementary and Secondary Education’s Sub-Committee on English Language Learners, 2009), and persistent inequities of opportunity and access are well documented . Addressing such inequities is further complicated as MCMLs experience a wide range of educational practices and policies that are developed and implemented at several governmental levels.

Barriers to the success of MCMLs go beyond academic learning in the classroom, and include larger societal issues such as poverty and attending under-resourced school districts (NASEM, 2017). For the past few decades, global neoliberal policy trends have steered the standardization and accountability movement, the increase of academic standards with the reduction of resources for schools, politics of severe austerity, cultures of audit, attacks on teachers and unions, privatization, openly racist and xenophobic climates, and the attempt to define sanctioned knowledge as including only that which serves powerful economic interests (Apple, 2006, 2018; Au, 2008, 2011; Nolan, 2018; Sampson, 2018). Biesta (2006, 2014) expresses the concern that “education is increasingly positioned and perceived as a private good – that is, a means for private (economic) advantage rather than as a public good oriented toward democracy and social justice” (2014, p. 16). Changing systems of oppression such as those fostering economic and racial inequities must by necessity incorporate larger social, economic, and political reforms (Anyon, 2005). Increasing avenues of access, equity, agency, and success for all students will require knowledge, skills, imagination, and compassion at all levels, from how we as community members organize our thinking; to how we distribute our resources; how we structure our schools, districts, state, and federal departments of education; how we plan and act in our classrooms; and beyond.

In its larger frame, this study contributes to the body of work examining how educators negotiate, contest, appropriate, and reconstruct federal and state-level policy in their classrooms (e.g., Bartlett & Vavrus, 2014; Buxton et al., 2015; Keenan, 2018; Levinson, Sutton, & Winstead, 2009; Shore & Wright, 1997; Sutton & Levinson, 2001; Valdiviezo, 2010). This examination is particularly important in a time of increasing standardization and narrowing of curriculum and educator autonomy (Apple, 2006, 2018; Au, 2008, 2011; Biesta, 2006; Canagarajah, 2004; Johnson & Freeman, 2010; Levinson et al., 2009; Menken & García, 2010; Nolan, 2018, 2018; Norton & Toohey, 2004; Sahlberg, 2016; Sampson, 2018).

As a particular instance of this phenomenon, I examine how educators operationalize, negotiate, appropriate, reconstruct, and/or circumvent federally-mandated English Language Development (ELD) Standards,² in this case, the 2012 Edition of the WIDA ELD Standards Framework, as it is currently in use in 42 U.S. states, territories, and federal agencies, as well as more than 500 international schools (WIDA, 2018a, 2018c). Research indicates that WIDA ELD standards, although well-intended, have not been user-friendly enough in their design to be meaningfully and widely operationalized by educators in practice, leaving many educators across the nation asking for additional help from standards-setting organizations and state departments of education (e.g., Bailey, Butler, & Sato, 2005; Bailey & Huang, 2011; N. Lee, 2012; O. Lee, 2018; DESE, 2016; Molle, 2013; Westerlund, 2014). This study

² Traditionally, these have been called English Language Proficiency (ELP) standards. Around 2012, WIDA wished to highlight the developmental nature of language learning, so it renamed its standards “English Language *Development* Standards” and maintained the title of “English Language *Proficiency* Assessment” to signify the single-snapshot nature of the ACCESS test, which captures the student’s English proficiency in one moment and in that context for accountability purposes. In this paper, for ease of reference, I generally refer to ELD standards and ELP assessments.

has the potential to inform policy processes, teacher preparation programs, professional learning opportunities, and the design of future language development standards and related tools.

In the first two chapters, I present the problem statement around the current edition of the WIDA ELD standards (2012); develop research questions; advance a rationale for my proposed study; offer a critical democratic theoretical framework, and a sociocultural conceptual framework with regard to policy; contextualize the landscape of educational policy in relation to MCMLs; examine the current literature on WIDA ELD standards; and finally propose to study how the Next Generation English as a Second Language Project: Model Curriculum Units (NGESL MCUs) (MADESE, 2016) and its Collaboration Tool³ (MADESE, 2016a) might facilitate processes that intentionally promote the simultaneous development of content and language, a proxy for a central aspect of WIDA ELD standards implementation.

Problem Statement and Research Question

At the classroom level, one of the major challenges in educating MCMLs in U.S. standards-based K-12 public school systems has been the operationalization of ELD standards, and the identification of practical and user-friendly ways for language and content

³ The Collaboration Tool is introduced at the end of Chapter 2, and will be more fully explored in Chapters 4 and 5. For a preview, the Collaboration Tool can be accessed at:
https://wida.wisc.edu/sites/default/files/Website/State%20Pages/Massachusetts/MA_Collaboration_Tool.pdf.

For initial exploration of the Collaboration Tool, please see the Interactive Guide to the Collaboration Tool (download for full interactivity):
https://wida.wisc.edu/sites/default/files/Website/State%20Pages/Massachusetts/MA_Collaboration_Tool_GUIDE.pdf.

For a deeper dive, see also Chapter 3 of the Next Generation ESL Curriculum Resource Guide:
<http://www.doe.mass.edu/ele/instruction/resourceguide.docx>

educators to be able to plan and deliver instruction that addresses the simultaneous development of language, grade-level concepts, and analytical skills (A. Bailey et al., 2005; A. Bailey & Huang, 2011; Heritage, Linqunti, & Walqui, 2013; O. Lee, 2018; Molle, 2013; TESOL, 2013; Westerlund, 2014). Since educators in public schools in the WIDA Consortium must work under particular standards-based systems, part of the challenge with the WIDA standards⁴ lies in their generative and dynamic nature. Whereas on the one hand, this can empower teachers to co-author the standards, on the other it presents a need for greater concreteness and clarity. More research is needed to examine how the WIDA ELD standards can be more meaningfully and widely implemented (Bailey & Huang, 2011; Lee, 2012; Molle, 2013; Westerlund, 2014).

Prompted by a loud request for help from educators of MCMLs in Massachusetts, the Office of Language Acquisition (OLA) at the Massachusetts Department of Elementary and Secondary Education (MADESE) led the field-based, collaborative NGESL project in partnership with local practitioners and various organizations, including the Massachusetts Association of Teachers of English to Speakers of Other Languages (MATSOL), the Northeast Comprehensive Center (NCC), WestEd, the Center for Applied Special Technology (CAST), and with the help of WIDA (MADESE, 2016).

A centerpiece of the NGESL Project was the development of the Collaboration Tool, designed precisely as a response to the challenge voiced by educators regarding the operationalization WIDA ELD standards (a static version of the Tool appears in Appendix A,

⁴The WIDA standards are further explained in the literature review section.

and Chapter 4 offers a detailed description of the Tool). Since its publication in 2016, the Collaboration Tool has generated a good deal of interest, as described in the “Rationale” section of this chapter. The following pages further explore the challenges associated with meaningful implementation of the 2012 Edition of the WIDA ELD standards, and present convincing reasons to study how the NGESL’s Collaboration Tool might facilitate processes for educators to intentionally promote the simultaneous development of language and content, a chief aspect of ELD standards implementation. For this purpose, I propose the following research questions:

1. How might the NGESL Collaboration Tool facilitate processes that intentionally promote language and content development for MCMLs?
 - a. How is the *Tool designed* to promote processes that advance language and content development for MCMLs?
 - b. How do *education actors from different settings report using the Tool* to promote language and content development?
 - c. How do *education actors in one school report making meaning of and using the Tool* and its processes?

Rationale

There are four areas that warrant a study on the operationalization of WIDA Standards:

1. Demographics and academic standing of MCMLs. In the U.S., MCMLs have been the fastest growing subgroup for the past several decades (NASEM, 2017; National Center for Education Statistics, 2016; Wiener & Pimentel, 2017). MCMLs are much more likely to live in poverty and come from families with low

levels of education, and data from 2012-2014 reveals that MCMLs represented the largest subgroup of homeless children in the U.S. (NASEM, 2017, p. 86). There is abundant literature documenting opportunity gaps and educational attainment differentials between sociodemographic groups – the gaps appear to be entrenched, and associated with negative outcomes in education, employment, health, and other social aspects (M. J. Bailey & Dynarski, 2011). MCMLs face significant opportunity and academic gaps,⁵ including lower likelihood of enrolling in high-quality early education programs (Park et al., 2017a, p. 1), low graduation rates, and high dropout rates (MADESE, 2017a, 2017b; National Clearinghouse for English Language Acquisition, 2016; U.S. Department of Education, 2016). This dropout rate is staggeringly high and worrisome, as it has been inversely correlated with higher income, better housing, healthier food, mental/emotional/ physical health, social support, prestige, power, etc., and has been directly linked to substance abuse, pregnancy, poverty, welfare, and lack of employment (Freudenberg & Ruglis, 2007). Policy makers and educators can and must do better than this. As education and society are inherently connected (Jeyaraj & Harland, 2016), educators and citizens alike must critically think about how public education systems relate to these structural patterns of inequalities.

⁵ See Gloria Ladson-Billings on the “educational gap” versus the “educational debt” (2006), as well as Leigh Patel (2015) for a perspective on the achievement gap as a socially constructed concept to invisibilize and reseal settler colonialism. Furthermore, recent research indicates that failing to consider EL longitudinal data can be misleading for accountability and other purposes (de la Torre et al., 2019; Kanno & Winters, 2018; Kieffer et al., 2017). Research supports the idea that ELs have the same potential as native and proficient English speakers to meet the same high expectations outlined in state standards (Boals et al., 2015; Cook et al., 2012). A discussion of which assessments are valid, reliable, and fair to the EL population lies outside the scope of this paper.

These numbers point to the need to further examine the ways we educate MCMLs, and if standards are to serve as a blueprint to drive curriculum and instruction, the question of how educators can meaningfully operationalize ELD standards comes back into focus.

2. International, national, and state calls for a greater focus on MCMLs.

Opportunity, access, and equity gaps such as the ones described above have led various organizations to call for a greater emphasis of attention and research for MCMLs. Recent examples include the Global Compact for Safe, Orderly, and Regular Migration (UN General Assembly, 2018b) and the Global Compact on Refugees (UN General Assembly, 2018a). Examples at the federal level include the National Professional Development Grants focusing on improving instruction for MCMLs; The National Center for Education Research’s English Learner Grant Programs (see for example the 2019 grant “Core Academic Language Skills Instrument: Refining the Assessment to Measure and Monitor English Learners’ Progress” for \$1,398,956); and the Regional Educational Laboratory’s English Learner Alliance,⁶ funded by the Institute of Educational Science. At the local level, the Massachusetts Every Student Succeeds Act (ESSA) Plan (2017) calls for greater efforts and allocation of resources to better serve populations that are “particularly disadvantaged and high needs” and “traditionally underserved,” so that they have greater equity to “engage as active and responsible citizens in our democracy” (MADESE, 2017d, p.1). This “traditionally underserved” population

⁶ Disclosure: I am a founding member of the REL’s EL Alliance.

includes students who are MCMLs, those receiving special education services, economically disadvantaged students, and/or members of racial and ethnic minority groups. Understanding how to better implement educational policy around MCMLs, including examining the ways educators operationalize language standards in their classrooms, has the potential to inform policy, educator preparation, professional development (PD) efforts, and future iterations of ELD standards and related tools.

3. Scholarly literature underscores the need for further research. A recurrent theme in the literature highlights that much more research is needed in various areas of MCML education (Anstrom et al., 2010; August et al., 2004; A. Bailey & Huang, 2011; Blair, 2016; O. Lee, 2018a; Lightbown & Spada, 2002; Morita-Mullaney, 2016; Ruiz-de-Velasco & Fix, 2000). In 2017, the NASEM released *Promoting the Educational Success of Children and Youth: Promising Futures* focusing on MCMLs. One of the committee's main charges was to develop a research agenda identifying gaps in knowledge about MCMLs, specifically with regard to understanding the influences on their educational achievement. Among the many topics identified by the committee was the need for additional research in the area of effective instructional strategies (NASEM, 2017, p. 479), a call that can be directly related to this study.
4. The NGESL Project and its Collaboration Tool. In response to a need that educators in the field expressed, the NGESL Project and its Collaboration Tool bring together complex interacting systems with the intent to make the operationalization of WIDA standards more user-friendly for teachers. In 2017,

Pennsylvania and Nevada rolled out initiatives based on the NGESL Project, with other states expressing interest. The NGESL Project and its Collaboration Tool have been incorporated in education preparation courses in Massachusetts and beyond. WIDA providers of professional learning have anecdotally reported a positive reception in the first international schools where the Tool was introduced (Dassler, 2017; Ottow, 2017). WIDA has also incorporated various videos produced by the NGESL Project in their national and international professional learning offerings. Moreover, in 2017 and 2018, WIDA Co-Founder and Lead Developer Margo Gottlieb and then WIDA Director of Standards Mariana Castro (now Deputy Director at the Wisconsin Center for Education Research) shared that they regularly received a great deal of inquiries about the Project and its Collaboration Tool from educators and state educational agencies alike. Educators who had been involved with the NGESL Project were selected to be featured in videos for a new course that was rolled out nationally in 2019 in support of Castro and Gottlieb's (2017) book *Language Power: Key Uses for Accessing Content*. The WIDA Professional Learning Department further chose a Massachusetts district that had also been involved in the NGESL as a filming site for multiple videos (2020). All of these projects have the potential to affect a large number of students.

In summary, given inequities and the general current academic standing of MCMLs, calls from international organizations and governmental agencies for greater support for MCMLs, a clearly documented need for additional research, and the fact that use of the NGESL Project and its Collaboration Tool are both promising and growing, a logical next

step is to investigate how the NGESL Project might illuminate some of the ways in which educators use policy-driven tools to intentionally promote the simultaneous development of language and content for MCMLs.

Theoretical Framework: Broader Critical Theoretical Grounding

The larger theoretical framework of this study begins from a broad critical stance, informed by a web of sociocultural, poststructural, critical pedagogical, intersectional feminist, historical-materialist, postcolonial, and policy-related studies. In my current world view, and in a synthesis of some broad strokes of these schools of thought, the whole of reality is not fully accessible to humans, knowledge is not easily bound or finite, and the ways people understand and create meaning are situated in identity, culture, time, and place (Patel, 2015).

Poststructuralism shares much with postmodernism in its rejection of the ideal of metanarratives, or universal truths that define a single correct interpretation of a given phenomenon (R. Bernstein, 1992; Harvey, 1991; Lyotard, 1984; Olsson, 2008; Rosenau, 1991). The subject's understandings of this world are not a purely objective perception of reality, but instead are constructions borne out of the subject's meaning-making, and thus no single construction can claim a global, immutable, and absolute truth (Shadish et al., 2001). This broad framework paves the way to increase the legitimacy and right of diverse voices at various levels within the educational system to challenge the official discourse of policy-making organizations when it does not serve them well, and makes a case to increase avenues of democratic practices in decision-making for public schooling.

This broad critical framework presents a clear to challenge positivism. Still, there is a lure and a comfort in what seems certain, in an absolute logic and a definite approach to

rational understanding and truth. What is fixed and definitively known allows the subject to feel more comfortable in making judgments and decisions, in writing law and policy, and in taking action, as though there were a fully stable world to be discovered which existed outside of human belief, perception, culture, and language (Hart, 2018). Yet, given the history of the range of horrors that humans have inflicted upon each other in the name of truth and reason (e.g., “scientific” racism, technology of weapons of mass destruction, exploitation of natural systems, etc.), an unsettling refusal of absolute objectivist and positivist stances becomes essential if humans are to hope for less damaging ways to engage with history and continue to co-construct our realities in more socially just and egalitarian ways.

I am marked by the Frankfurt School’s notion that the apotheosis of the enlightenment’s cult of mechanized, efficient, instrumental reason can be argued to be embodied in the carnage of World War II (Maddox, 1989). I fear the blind faith in rationality and the overconfidence in the supposed precision of science that have often justified the subjugation of the Other, nature, and the world at large. The logical conclusions stemming from this kind of paradigm can lead the subject to a place where the drive for productivity and profit, and the law of the market, usurp any other kind of human value, and humans are forced to “lose their manifold nature” (Weber, 1968). Kliebard (1975) echoes Marx in reminding readers that “the price of worship at the altar of efficiency is the alienation of the worker from his work – where continuity and wholeness of the enterprise are destroyed for those who engage in it” (p. 66).

In my work in education, this foments a skepticism of an absolute faith in scientific algorithms, and of a kind of positivist system that places rigid controls on teachers to create environments that are akin to the education production model of the factory line and

scientific management of the early 20th century (Au, 2011). This kind of rationality sets the stage for teachers-as-workers to lose control of both the teaching process and of their own labor. Instead, I wish to highlight a different kind of philosophy that values the diversity and variability of human experience, and thus I am more drawn to a pedagogy that seeks to humanize both students and educators (Freire, 2000). The unmaking of a cogito that obsessively aims to sort and control is necessary for any commitment to inclusive humanization.

Along these same lines, I appreciate Thomas Kuhn's notion that the development of "scientific knowledge" does not present a steady advance through time, but is instead a human affair like any other, entangled in human values, interests, foibles, and fallibility (Kuhn, 1970, as cited in Crotty, 1998). The production of scientific knowledge begins to reveal its cultural character, grounded as much in its socio-political context as any other belief the subject may hold (Feyerabend, 1987). This frame should help to make visible that, if knowledge is nested in cultural and socio-political context, and steeped in value, then this presents an argument for supporting the inclusion of marginalized voices (such as those of diverse teachers and students) who are generally excluded from large-scale decisions made in traditional state and federal top-down models. Here, a refusal of a single lens of "objective" knowledge within the complex, very human world of education legitimizes the experience of educators as they seek to better make sense of federally mandated and state-sanctioned policy and standards.

Still, it is difficult to dispense with the notion that an objective, meaningful reality exists, and the belief that, through the right methods, one is capable of revealing its truths. On the other hand, I am also not satisfied living in a world of complete subjective relativism, so

a slice of phenomenology becomes important for me to frame my understanding of the creation of meaning as situated in the interaction between the subject and the object. Phenomenology begins to posit that subjects' meaning systems has been bequeathed to them (Crotty, 1998, p. 82). There is something that exists outside of ourselves: subjects are born into a world of objects and concepts that precede them, into a culture, a history, and a social world. The subject's framing of problems in the world is constructed in thought, but the difficulties the subject identifies and problematizes are produced by external material processes (Fairclough, 2013). In terms of my study, this can be linked to how educators' cognitive processes in attempting to make sense of policy are intertwined with their experiences in the physical and social worlds (Valdiviezo, 2010, p. 256). Moving beyond phenomenology and into poststructuralism, a justifiable position becomes clear to argue that subjects negotiate meaning through a productive process, so that neither does the world simply impose meaning on the subject, nor does the subject make meaning independently of the world (Fairclough, 2013; Fairclough & Graham, 2002; Marsden, 2014; Wenger, 1999).

In this sense I approach a critical realism where ontologically I acknowledge that a real world exists outside of the subject's perceptions and theories, while simultaneously holding on to an epistemological constructivism that accepts that the subject's understandings of this world are inevitably a construction situated in the subject's context (Hart, 2018; Maxwell, 2013). Social reality is conceptually mediated: social practices and events always exist within their own representations, construals, conceptualizations, and theories, and therefore have a reflexive character in that the ways people see, represent, interpret, and conceptualize them (Fairclough, 2013; Fairclough & Graham, 2002; Marsden, 2014).

In discussing critical discourse analysis and poststructural discourse analysis, Fairclough (2013) adds that the way that the subject selects and problematizes aspects of the world and the subject's interactions within it is construed in terms of particular discourses. Discourse, living within the context of its relationship to other social elements such as power, ideologies, institutions, and social identities, is both individually and socially constructed and informed by material realities, and can have real effect on social change and the production and contestation of hegemonies (Fairclough, 2013). We, as social actors, act upon the world through discourse – with particular interpretations, representations, and problematizations of contexts in action – all the while constructing and deconstructing thinking, and providing reasons for external actions. One avenue for educator negotiation of policy is through analysis, negotiation, contestation, and reframing of official and unofficial discourse. Educators' framing and sense-making around policy and practice matter, and better understanding these framings and perspectives has the potential to improve the interplay of policy and practice.

Whereas social, political, or natural phenomena are inseparable from how subjects give them meaning, this meaning has the potential to constantly move, change, and shift in various directions (Gottweis, 2003). If meaning is situated between the subject and object, and both subject and object can shift, there is room for transformation. If subjects are to locate contradictions, to question, reinterpret, and transform narratives, and to bring out complexity instead of reducing the object to more easily digestible forms, it becomes essential to remember Adorno's (1981) calling of the reader's attention to "everything that has slipped through the conventional conceptual net" as possible material for potential reframings (p. 240). This awareness that one cannot perceive and examine the totality of

actions and angles of the world is applied to public policy in Sabatier (2014), who argues that “given the staggering complexity of the policy process, the analyst must find some way of simplifying the situation in order to have any chance of understanding it. One simply cannot look for, and see, everything” (p. 4). Yet, rather than taking one view as the “natural” simplification of complexity, the subject can reposition themselves as necessary, and question what may have been purposely or accidentally included or excluded in the perception, the awareness, the narrative, and the discourse.

What happens to how we create meaning as researchers if we begin from a more humble position that acknowledges limitations to human conceptual understanding, that we cannot see all possibilities at once, from this time/place/body/identity/culture? What happens to our research when we seek to pay attention to other, contradicting, varying angles of the concept?⁷ The potential emerges for the narrative to shift, for a reinterpretation that questions forms of ideological domination such as those that deem certain groups of students as chronically underperforming and their teachers as perpetually incompetent. As researchers, we must be sensitive to vulnerable groups and imbalanced relations of power (Hatch, 2002). Educational policies and reforms are not simply technical endeavors: they too are shaped by cultural, economic, and political projects, and emerge through particular histories and contexts that often leave unquestioned ideological assumptions and visions about the purpose of schooling and those who are included or excluded in such visions (Apple, 2018).

There is hope in that, although subjects are born into a world of socially-constructed meaning, critical approaches can help us become more conscious to analyze slippage of

⁷ See Adorno’s tyranny of the concept associated with language and its representations (1981).

meaning, identify incongruities, and deconstruct narratives. The potential exists to continuously decenter/recenter different kinds of meaning, and the constructed nature of official knowledge becomes less opaque. A stance informed by poststructuralism offers subjects a next step where, beyond simply focusing on ambiguity of meaning, this ambiguity is identified “as the central location at the edge of critical reason that helps identify ethical choice” (Harcourt, 2007, p. 23). This distinction informs my inquiry by making it clear that in any choice the subject makes as they construct meaning and knowledge around educational policy and practice, their ethical stance matters greatly.

As we deconstruct and reconstruct knowledge and ambiguate meanings, how do we responsibly shape and create knowledge as researchers? One might argue that in the end, humans – and researchers – operate in creative readings and writings of and with the word and the world, bound solely not only by either subjectivity or objectivity, but through the shifting interaction of subject and object. So what position and meaning does one choose to take? I am drawn back to critical theory’s desire to identify and displace forms of social discourses that are exploitative or unjust (Cowden & Singh, 2013; Norton & Toohey, 2004). As we demystify and pull back veils to the extent possible along the way, how do our thoughts and actions serve to humanize, to lessen suffering, and to emancipate? According to Adorno (1974), “the only philosophy which can be responsibly practiced in the face of despair is the attempt to contemplate all things ... from the standpoint of redemption. Knowledge has no light but ... by redemption: all else is reconstruction, mere technique” (p. 247). A researcher must always endeavor to become conscious of how one’s work will foster or challenge exploitative educational discourses, and whether one’s work will serve to humanize or dehumanize subjects living in a complex web of social relationships. This is one

reason why it is not sufficient to consider only the technical aspects of ELD standards and the NGESL Project, but to also name the larger pedagogies that frame them.

My current approach to research then, posits that to responsibly join a community of researchers who seek to humanize and emancipate, scholars must do better than to deconstruct only for deconstruction's sake. We must be conscious of how the language and knowledge we produce help to transform or maintain various forms of social, cultural, and material structures. We must also approach the work humbly, understanding that all knowledge comes from somewhere and someone (Patel, 2015) and so it is indeed, as Kuhn (1970) proposed, a very human affair. We must continuously question the subject and the object, working to make visible the ethical choices behind each stance, cautiously tending to the consequences of our actions.

Theoretical Framework: Radical Democracy as Center of the Public Educational Endeavor

The broad theoretical stance I laid out above avoids both absolute positivism and complete subjective relativism, and acknowledges that the subject creates meaning in ways that are situated in identity, culture, time, and place. This stance holds onto the hope of the potential to continuously decenter and re-center different kinds of meaning, grounded in ethical choice, as subjects continue to co-construct their realities as agentive cultural/material/historical actors. I add that in this context, a humanizing educational endeavor must also have a democratic stance as a foundation.

As a critical educator, I am concerned with how scholars and practitioners conceptualize and enact a democratic society. Linking education to democracy, John Dewey has argued that any progressive work in teaching must “emerge from theorizing conditions

for a particular form of democratic life, articulating the practical role that certain forms of education play in this life, and attempting to create conditions for such work to be effective” (Amsler, 2013, p. 67).

While definitions of the “good citizen” as well of an “authentic democracy” are not without contention, I would like to center Antonio Gramsci’s (2000) notion that “democracy, by definition, cannot mean merely that an unskilled worker can become skilled. It must mean that every ‘citizen’ can ‘govern’ (Anyon, 1981; Gramsci, 2000, p. 318).⁸ The idea of a democratic education can be expanded to include not only “nationals” but also global citizens, a message that is reinforced by states such as Massachusetts where – in law and in theory, at least – public schools must welcome and educate all students, regardless of immigration status (Healey, 2017).

Many scholars have explored the idea of democratic education (Apple, 1999, 2006; Daiute, 2000; Davies, 2001; Greene, 1986; Hantzopoulos, 2008; Meier, 2000a).

Hantzopoulos’s (2008) literature review reminds readers of the challenge in enacting democratic practices. For example, McGinn (1996) argues that, since democracy has been seen more and more as a closed system that is irresponsive to people’s needs, it is often met with skepticism, and therefore educators must take on the challenge to satisfy a desire for a much more genuine kind of democracy. Apple and Beane (1995) encourage educational practices that allow subjects to experience authentic, inclusive decision-making spaces.

Under such conditions, when all subjects are supported to engage in collective knowledge-

⁸ For a discussion of differences in the educational experiences made available to students of varying social classes, and whether each class is positioned to govern, see Anyon’s “Social Class and School Knowledge” (1981).

making, they can learn, practice, and live the fundamentals of genuine democratic participation. Importantly, rather than pushing a veneer of manufactured consent toward preordained decisions, democratic education must genuinely honor the right of subjects to engage in decision-making processes that affect their lives. Crucial as well is Denzin's (2009) notion that "a genuine democracy requires hope, dissent, and criticism" (2009b, p. 383). Ultimately, to these scholars, a democracy cannot be a static order maintaining a stagnant status quo, but must instead be a continuous, vibrant, and collective movement (West, 2005).

These considerations of democracy point to the need for public schools to develop the ability of students to engage with democratic critiques and processes to be able to potentially lead their communities into the kind of civic society that they envision – all of which should be modeled by how educators (and policymakers) interact and work with each other, with students, with families, and the community at large. Thus, teachers as well should be encouraged to engage in democratic processes at various levels, including policy-making, to collectively make meaning around the purpose of education; the content they are supposed to teach; the pedagogy they are to use; the ways these options include or exclude individuals and segments of the population; and to create narratives, processes, and tools to deliver high-quality education that continues to seek to humanize, emancipate, and increase equity for students and society at large.

Although my present study focuses on public education, it is important to connect these pedagogic democratic ideals to wider practices of public pedagogy and community education (Benhabib, 1993; Biesta, 2006, 2014; García et al., 2012; Giroux, 2004; Mitchell, 1995; Sandlin et al., 2009, 2011). In applying these ideas to language education, the work of

scholars such as Zakharia and Bishop (2012) demonstrate how community-based bilingual education can integrate students' ethnolinguistic identities to develop cultural understandings; address injustice, discrimination, and conflict; and when framed in a manner that develops "positive peace," it can promote the absence of structural violence and carry the potential to "promote peace in the lives of individual students and broader society by addressing discrimination and the narrow definitions of what it means to be American" (p.189).

Unfortunately, Apple (2006) warns readers that current dominant trends in educational reform and in the public sphere have already begun to cement damaging consequences in terms of how people understand democracy, as well as in how some communities understand the need for a critically democratic education as a vital means to achieving it. As critical educators, it then behooves us to lay these movements and effects bare, and to make clearer the duty and relationship that education has to protecting, maintaining, and strengthening democratic thinking and practices in democratic societies. As necessary, we must also recognize and critique the limitations of representative democracy (Levinson et al., 2009; Santos, 2007; Varoufakis, 2018).

Conclusion

This broad critical and democratic theoretical stance frames my proposed study around educator sense-making and negotiation of the policy of ELD standards, and grounds my inquiry into how the field-developed NGESL Collaboration Tool might facilitate the intentional simultaneous development of content and language for MCMLs, a chief aspect of ELD standards implementation.

The stance frames the study by acknowledging that humans are born into a particular time, history, materiality, and culture (educators are born and socialized into a history and culture of educational policy that precedes them) – and by holding onto the hope that subjects are agentive historical beings who have the potential to engage with the conditions of existence (educators can become conscious of the discourse and ideology of current policy and intervene where necessary through their networks, cultures, and practices) since: 1) meanings put forth by powerful policy-making and standards-setting organizations can be questioned, affirmed, negotiated, appropriated, contested, and reconstructed; 2) in addition to numbers and results from empirical studies, educators’ practical, living experience is also legitimized, and there is an acknowledgement that subjects’ identities, internal experiences, beliefs, and ideologies – as well as the sociopolitical and sociocultural contexts in which education and its processes takes place – are an inevitable part of the policy process; 3) dialogue, multiplicity, diversity, and humanization are not strictly subordinate to reductive forms of statistical data, unquestioned “scientific” top-down research,⁹ and economies of efficiency and profit; 4) there is room to locate ambiguity, slippage, and breakdown of meaning and to engage in creative readings and writings of the word and world while grounded in ethical choice; 5) through a democratic stance, educators are legitimized in

⁹ A note of caution here: Like Nolan (2018), I believe that educational practice should be informed by rigorous research, but we must be aware of scholarship that warns us against the potential misuse of research and data to support dominant trends in education reform, so that research does not become post hoc legitimation, but instead the foundation from which policy is made (Baker & Welner, 2012; Lather, 2004; Welner & Molnar, 2007).

crafting solutions even if they challenge established power structures, and classroom educators too can be supported as leaders, researchers, and intellectuals.

Ultimately, this study has the potential to inform policy processes, professional learning offerings, teacher preparation programs, and the design of future language development standards and related tools. Study results also have the potential to propel practice and pedagogy forward to ensure an equitable education for all students, including MCMLs.

CHAPTER 2

LITERATURE REVIEW

I begin Chapter 2 by describing my literature review methodology, and then build a conceptual framework that frames policy as a sociocultural practice of power. Next, I review broad educational policy trends before more specifically looking at language policies in the U.S., and more particularly at the federal requirement for English Language Development (ELD) standards and its adoption in the state of Massachusetts. Then, I explore WIDA standards via two lenses: as a product and conveyer of the standards and accountability movement, and as covert resistance to the standardization movement. Subsequently, I review empirical studies on the implementation of WIDA standards. Lastly, I briefly introduce the Next Generation English as a Second Language (NGESL) Project and its Collaboration Tool as one possible field-based response to the challenges voiced by educators around the practical implementation of the 2012 Edition of the WIDA ELD standards.

Grounded in the critical democratic theoretical framework laid out in Chapter 1 and the research questions and methodology described in Chapter 3, I set the stage for my inquiry into how the NGESL Collaboration Tool might facilitate processes that intentionally promote language and content development for Multicultural and Multilingual Learners (MCMLs), a chief aspect of ELD standards implementation. This topic is emblematic of how educators appropriate and reconstruct policy in their classrooms.

Methodology for Literature Review

In searching for sources on WIDA ELD Standards for this study, I conducted a systematic search of the academic and organizational (grey) literature through the following process. I searched various databases. ERIC returned 26 results related to WIDA, and three were directly relevant to this study. A JSTOR search for WIDA returned 474 results. Adding the Boolean operator “and” and the word “standards,” titles were narrowed to 63. All were considered for inclusion in this study. ProQuest contained 767 peer-reviewed results on “WIDA.” I used Boolean operators to limit the search to “WIDA and standards and teachers and teaching.” I reviewed 65 results for potential inclusion in this study. A search for “WIDA” across all repositories of ScholarWorks returned 903 results. Adding the words “standards,” “teachers,” and “teaching” reduced results to 401. I then examined these results through the disciplines of “Bilingual, Multilingual, and Multicultural Education” (63 results), “Teacher Education and Professional Development” (31 results); “Other Teacher Education and Professional Development” (3 results); “Education Policy” (3 results); “Curriculum and Instruction” (27 results); and “Educational Leadership” (14 results).

I also searched through various primary research journals, and starting in early 2017, I started receiving alert notifications for new publications from relevant journals, which included: *American Educational Research Journal*, *Bilingual Research Journal*, *Educational Policy*, *Educational Researcher*, *Harvard Educational Review*, *International Journal of Bilingualism*, *Higher Education for the Future*, *International Journal of Multicultural Education*, *Language Teaching Research*, *Journal of Teacher Education*, *Second Language research*, *Research in Education*, *TESOL Quarterly*, *Theory and Research in Education*, *Review of Educational Research*, *Review of Research in Education*.

I searched relevant reports and research banks maintained by organizations that have developed ELD standards and/or related tools, such as WIDA, ELPA21, the California Department of Education, the Council of Chief State School Officers (CCSSO), and the National Clearinghouse for English Language Acquisition (NCELA).

I accessed personal and professional networks and reached out directly to experts in the following organizations: WIDA, WestEd, the Northeast Comprehensive Center (NCC), the Applied Linguistics Department at the University of Massachusetts Dartmouth, the School of Education at Indiana University – Perdue University Indianapolis, the Harvard Graduate School of Education, the Regional Educational Laboratories (REL), and the Center on Standards Assessment and Implementation (CSAI) for suggestions of which additional studies I should include in this systematic review. I reached out to the community through members of the Massachusetts Research Advisory Council on Multilingual Learners (RACMUL), Massachusetts Association of Teachers of Speakers of Other Languages (MATSOL), and the Multistate Association for Bilingual Education (MABE).

In addition to a search on WIDA, with regard to the literature on educator negotiation and appropriation of policy, I searched through the databases above using combinations of the terms “English learners,” “teachers,” “policy,” “perspective,” “appropriation,” and “response.”

Through the described process, I gathered literature and studies from the various sources. I identified additional texts by examining the reference lists at the end of relevant articles, books, and studies. I also searched thorough literature reviews on the topics of “standards” and “academic language.” I used literature reviews and conceptual pieces to frame central issues. I did not exclude any results based on location or language, but looked

broadly for any studies with direct relevance to the topic. I reviewed empirical studies from different methodological traditions, including experimental and quasi-experimental studies; correlational studies; surveys; descriptive studies; interpretative, ethnographic, qualitative, and case studies; and demographics and large-scale achievement data. I included articles, empirical studies, literature reviews, and conceptual pieces. I generally excluded practitioner-oriented articles (e.g., teaching suggestions or descriptions of instructional programs, materials, or lesson plans) as well as opinion and advocacy pieces that were unsupported by empirical evidence.

In the literature review that follows, I first establish a sociocultural conceptual framework of policy as a social practice of power. I then review the landscape of educational policy in the U.S. both broadly and in terms of MCMLs. I also describe some of the challenges associated with the operationalization of WIDA ELD standards, and introduce some foundational ideas behind the NGESL Project's Collaboration Tool.

Conceptual Framework: Policy as Appropriation

In order to study how educators make sense of, negotiate, and operationalize federally-mandated ELD standards, I first wanted to define policy. Yet, the more I read, the more difficult it became to do so (Cairney, 2011; Weible & Sabatier, 2017). Policy has been defined in myriad ways, for example: “The actions of government and the intentions that determine those actions” (Cochran as cited in Birkland, 2010, p. 18); “Whatever governments choose to do or not to do” (Dye as cited in Birkland, 2010, p. 18); when “diverse activities by different bodies are drawn together into stable and predictable patterns of action which (as often as not) come to be labeled ‘policy’” (Colebatch, 1998, p. x); a form of discourse that functions as ideology (Bacchi, 2000); as the manifest intentions of power

elites for the distributions of social goods (Bhola, 2003); and as – under advanced capitalism – still modern, emanating from rationalist calculus, and carrying a veneer of representative democracy (Beck et al., 1994; Giddens, 1991); etc. Policy appears to be a multi-angled, multi-leveled, dynamic construct that is difficult to define, in its complexity leaving itself open to continuous inquiry and further exploration.

Given my theoretical grounding, I am drawn to sociocultural studies of policy as practice, policy as appropriation, and policy as a social practice of power (Bartlett & Vavrus, 2014; Levinson et al., 2009; Shore & Wright, 1997; Sutton & Levinson, 2001; Valdiviezo, 2010). Scholarship on the policy of language education in particular began around the 1980's (Kaplan & Badaulf, 1997; Menken & García, 2010; T. K. Ricento & Hornberger, 1996), but it too largely moved toward a stance informed by critical theory, and focused on the ways that language policies serve to produce or maintain social inequities (Canagarajah, 2004; Corson, 1998; Davison, 2006; Hornberger & Johnson, 2007; McCarty, 2010; Menken & García, 2010; Ramanathan, 2005; Tollefson, 1991). From these largely sociocultural approaches to the study of language policy, two frameworks centrally inform my thinking in the current study: Levison, Sutton, and Winstead's (2009) "Education Policy as a Practice of Power," and García and Menken's (2010) *Negotiating Language Policies in Schools: Educators as Policymakers*.

Levison et al. (2009) posit that traditionally, positivist approaches have characterized policy as a set of laws or normative guidelines, as a binding governing text that varies in its success in reordering behavior according to its mandates. They further argue that the traditional approach carries a technocratic liberal democratic ethos, excludes a social theory of policy, and fails to address the assumptions and interests that go into policy-making. In

terms of language policy, the positivist approach tends to deny the political nature of language education and research (Tollefson, 1991).

In looking toward a more critical approach to policy, Levinson et al. (2009) lay out a framework which proposes that subjects unpack policy to see it as a social practice of power, a complex set of interdependent sociocultural practices that have the potential to modify the technocratic landscape of most education policy initiatives which preclude a more democratic and participatory approach. Here, the discourse of power becomes central to policy studies.

Levinson et al. (2009) point to creative interpretations of policy that necessarily include local actors, who, by appropriating such policy, are in effect often developing new policy that is situated in locales and communities of practice. A static separation of social theory and policy are no longer viable (Bauman, 1991). The way local actors and communities “read,” receive, interpret, negotiate, or resist policy – or combine such approaches – is a recontextualization of policy (Bernstein, 1990). Nonetheless, it is important to remember that while educators are not simply blind followers implementing mandates from above, and play a crucial role in the dynamic language policy processes, language policies still carry hegemonic power to set boundaries to what is educationally permissible (Johnson & Freeman, 2010).

Levinson et al.’s (2009) framework can be directly connected to my theoretical framework. The authors argue that a critical approach to policy studies, when articulated via a sociocultural approach, can be a practice of power for democracy, seeking to increase the participatory limits of policy formation in a more democratic direction. They encourage inquiries about the relationship between forms of democracy and forms of policy, and

following Santos (2007), they highlight policy's potential for redistributive action through participation. Howarth and Griggs (2012) add that the central challenge of policy studies is to examine the patterns that structure inclusion and exclusion, as well as forms of antagonism within policy processes. This echoes as well Fairclough's (2013) concern that scholars and practitioners move away from a positivist view of policy to a position that recognizes the discursive character of policy, policy-making, and policy analysis, and instead attempt to elucidate the way policy serves to reproduce structures of inequality and domination (Levinson et al., 2009).

Turning specifically to language policies, García and Menken (2010) take notice of the expansion of top-down policies affecting MCMLs, including the standardization movement and its associated increasing dependence on prescriptive curriculum, and present additional theoretical understandings to frame the role of educators as critical agents in interpreting and negotiating language and education policies in schools. They call attention to the human dimensions of policies and place educators at the center of the policy process, highlighting micropolitical ideologies and the implementational spaces of educators as they reconstruct policy for their students. In line with the critical democratic theoretical framework I described above, García and Menken (2010) move away from unidirectional views of policy and frame it instead as socially constructed, nonlinear, dynamic, and interactive processes where internal and external dialectical forces both shape educators and are shaped by them, so that in the end, "language education policies are the joint product of the educators' constructive activity, as well as the context in which this constructive activity is built" (Valdiviezo, 2010, p. 256).

Since earlier conceptions of policy and its process were woefully insufficient to fully capture the complexities involved, García and Menken turned to Ricento and Hornberger's (1996) analogy of the onion to support their framework. In the "policy onion," legislation and political processes occupy the outer layer, and states, supranational agencies, institutions, and educators respectively move closer to the center of the onion. Here, the authors underscore the agency of individuals across all levels of policy implementation, and highlight educators' position at the heart of the onion as an often overlooked but essential policy lever operating at both official and unofficial capacities. García and Menken then present a series of studies examining how educators have "stirred the onion" by

locating ideological and implementational spaces within their own practices

(Hornberger & Ricento 1996), as it shifts the emphasis of the field from government official education policies that are handed down to educators to those that educators themselves enact in classrooms and in interaction with a myriad of other factors.

(2010, p. 249)

Lastly, it is worth noting the importance of locating the critical study of language policy appropriation by educators in cross-linguistic and cross-cultural contexts. Recent studies have explored individual and collective sense-making of policy, policy appropriation, policy reconstruction, policy as a social practice of power, and "peeling the onion" – through various layers (Bartlett, Lesley & Vavrus, 2016), and in various locations, including: Chile (Galdames & Gaete, 2010), China (Zhang & Hu, 2010), Ethiopia (Ambatchew, 2010), France (Helot, 2010), India (Mohanty et al., 2010), Israel (Shohamy, 2010), Kenya (Jones, 2014), Lebanon (Zakharia, 2010), Mexico (Levinson, 2004, 2005; S. Street, 2001), Netherlands (Tuytens & Devos, 2009), New Zealand (Berryman et al., 2010), Palestine

(Christina, 2006), Peru (Valdiviezo, 2010), South Africa (Bloch et al., 2010), United Kingdom (Creese, 2010). Examples in the U.S. include locations such as Philadelphia (Johnson & Freeman, 2010), New York (Grant et al., 2002), and Washington (English & Varghese, 2010), as well as other states whose names have been protected (Esposito et al., 2012; Keenan, 2018), and national studies (Duarte & Brewer, 2018; Stein, 2004).

Now that I have laid out a critical democratic theoretical framework and established a sociocultural lens to explore policy as appropriation and as a social practice of power, I turn to examine education policy, and in particular the federal requirement of ELD standards.

Background: Education Policy and the Standardization Movement

I would like to preface the discussion of the standardization movement by making a distinction between academic standards on their own and academic standards as a tool for the standardized testing and accountability movements in contexts laden with market-driven values. Many have argued convincingly of the potential of academic standards to democratize access to high-quality education (Bunch, Kibler, & Pimentel, 2012; Bunch, Pimentel, Walqui, Stack, & Castellon, 2012; CCSSO, 2019; Gandal, 1995), and to help reverse inequitable trends in education, such as when, in the absence of common and visible academic expectations, historically underserved groups were offered less rigorous academic courses and lessons, thereby contributing to access and opportunity gaps. However, as Au (2019) has pointed out, whereas the conversation about standards and equity is an important one, U.S.-based scholars and educators have never known standards outside of their context of education reform, and their complete embeddedness into high-stakes testing (some problematics of the high-stakes education reform movement are discussed below). This is to make clear that I am not critiquing the idea that academic standards as a concept can lead to

positive outcomes for students. Instead, my critique focuses on how standards have been used as a tool in the accountability and surveillance movement to scone the language of opportunity and equality as a façade for a global neoliberal economic agenda (Hantzopoulos, 2008) that decontextualizes, objectifies, and commodifies beings in education; cements a system that continuously re-categorizes students and promotes the disempowerment of educators; reduces creativity, exploration, and autonomy in education for the sake of efficiency, productivity, and rapid service delivery; reduces the imaginary of possible pedagogies and curricula; and in assuming assessment objectivity, denies individual, local, and contextual variability (Apple, 1999, 2004; Apple & Beyer, 1998; Au, 2018; Braverman, 1998; Cairney, 2011; Carhill-Poza, 2018; Carlsson, 1988; Enright, 2010; Noble, 1994; Palmer & Snodgrass Rangel, 2011; Patel, 2015; Sahlberg, 2016). Having offered this caveat, I now turn to a discussion of education policy and the standardization movement in the U.S.

General K-12 education in the U.S. is governed by the federal Elementary and Secondary Education Act/Law (ESEA, 1965). After its enactment, local autonomy was widely practiced among states (Tyack & Cuban, 1997). The birth of the standards-based accountability movement in U.S. education is often traced back to *A Nation at Risk* (National Commission on Excellence in Education, 1983), which argued that the educational system was in crisis, “eroded by a rising tide of mediocrity that threaten[ed] our very future as a Nation and a people” (n.p.). George Herbert Walker Bush’s *America 2000* (1991), Bill Clinton’s *Goals 2000* (1994), and Improving America School’s Act (1994) reinforced the narrative of crisis in the American public education system, and began to promote the need for national academic standards as a key necessary aspect for educational reform, proposing a reliance on high-stakes standardized testing as a measure of success and accountability that

would bring the nation out of its rising mediocrity, and the U.S. back to once again lead in global competition.

Similar to the Bush and Clinton policies, Thatcher's *Education Reform Act* (ERA) (1988) became the driving force behind education policy in many parts of the world, and the most globally-researched document of its kind (Levin & Fullan, 2008; Sahlberg, 2016). It encouraged "school competition and choice, standardization of teaching and learning in schools, systematic management of data through standardized testing, and privatization of public education" (Sahlberg, 2016, p. 130). Supported by international organizations such as the World Bank (Hargreaves et al., 2008), the standardization movement spread quickly across the globe, as evident in the U.S., Chile, Australia, New Zealand, South Africa, Central and Eastern Europe, the Middle East, Sweden, Spain, and East Asia (Sahlberg, 2016). Countries that resisted the global wave of standardization in their education systems included Finland, France, Germany, Denmark, Norway, Belgium, Japan, and South Korea (Sahlberg, 2016).

Some critics in the U.S., rather than taking this specific political framing of the problematization of global competition and public education at face value, engaged in a critique of the ends that would be achieved through this particular discourse. In an illustration of Fairclough's (2013) line of thinking, rather than assuming that the growing global policy narrative for standardization was "natural," or the single correct interpretation of reality, critics attempted to reveal how discourse was used to problematize a phenomenon in a particular way, for specific purposes that were not fully transparent, and to benefit certain groups of people.

Economist Paul Krugman (1994) argued that it was empirically untrue that the world's leading nations were in direct economic competition in any important degree, or that any of their economic problems could be earnestly attributed to failures in global competition. Instead, Krugman saw the competitive metaphor as a useful political rhetorical device used as an appeal to patriotic sentiment and a justification for often misguided hard choices that could lead to bad economic policies on a wide range of issues, even when not directly connected to global competition, such as in improving the educational system to raise productivity.

Other critics saw this educational policy movement as a disingenuous attempt to scapegoat an overburdened, growing, and diversifying school system, and expressed concern that the emphasis on standardized test scores – to the exclusion of other educational concerns – would lead to over-simplistic solutions for genuinely complicated educational problems (Berliner & Biddle, 1996; Glass, 2008; Meier, 2000a; Ravitch, 2016; Urban & Wagoner, 2014). Meier (2000b) contended that that the American educational crisis was caused not by a lack of standards or because of low achievement, but because Americans were witnessing a struggle over the very meaning of democracy, as it was being increasingly defined as consumer choice, and thus the idea of democratic schools was being lost. Meier (2000a) further argued that the centralization of authority and standardization prevented citizens from shaping their own schools, classrooms, and communities, and that schools should instead teach and exemplify democratic virtues. Sahlberg (2016) noted that in this standardization model, “professional autonomy is gradually replaced by the ideals of efficiency, productivity, and rapid service delivery” (p. 131). Hantzopoulos (2008) added that the agenda behind standards-based reform had the aim to move public education to the private sphere, linking

the reform to the highly profitable private testing industry, and cautioning against the language of equity and opportunity being ensconced as the façade of a global neo-liberal economic agenda.

Whereas some have argued that the standardization movement benefited schools through high expectations for all students and a more systematic focus on student learning – instead of just a focus on instruction (Sahlberg, 2016), others have argued that in reality, rather than increasing equity, the agenda of standardization and external accountability exacerbated inequality (Berliner, 2005; Goldstein, 2019; Gootman, 2006; Hantzopoulos, 2008; Levister, 2005; Sampson, 2018; Saulny, 2004). Research during the Improving America’s School Act (1994) showed that standards did little to motivate instructional improvement or to address larger systemic issues (Baker, 2006; Sahlberg, 2016; Shepard et al., 2009). Still others argued that “the only reform that stands any chance of making our public schools better is the investment in teachers – to aid them in their quest to understand, to learn, to become more compassionate and caring persons” (Glass, 2008, p. 249).

As the dominant official discourse around public educational systems was increasingly cemented in the U.S. in terms of productivity and global competition, a range of compatible solutions and exclusions followed in line, many increasing standardization and accountability while continuing a discourse of austerity. The National Governor’s Association’s (1990) agenda of systemic school reform dovetailed with the Global Educational Reform Movement (Sahlberg, 2016), and called for states to demand educational accomplishment from schools via the main vehicle of measurable educational standards, enforced through an aligned system of mandatory high-takes testing. This agenda was further solidified with George W. Bush’s renewal of The Elementary and Secondary

Education Act as No Child Left Behind (NCLB) (U.S. Department of Education, 2001), when states' roles were formalized to supersede school-level standards and to take over "failing" schools (Sampson, 2018). NCLB gave states considerable power over additional important dimensions of local schools (Malen, 2003), and deeply affected curricular reforms (Song, 2009). Obama's Race to the Top Act (2011) largely continued NCLB's trajectory, and the policy has once again been reauthorized as the Every Student Succeeds Act (ESSA) (U.S. Department of Education, 2015).

Au (2011) has argued that the standardization and accountability reforms of the past few decades, with its standards-based testing requirements and related processes of decontextualization, objectification, and commoditization, are central tools for a re-application of the factory-model principles of scientific management of the early 1900s. Au describes the current educational policy context as one of "New Taylorism," where the political economy of teaching coerces educators' labor to become pre-packaged and rigidly controlled, with corporate agendas overtaking schools to narrow curricula, determine which kinds of knowledge are legitimate, and to teach to the test, which in turn benefit the private sectors of education. In the current system, Au sees students positioned as raw materials to be commodified as products via their compliance and achievement of particular standards and objectives. Teachers are positioned as efficient line workers who follow the most efficient methods to get their students to meet the standards in system that often promotes their disempowerment and deskilling. Methods are determined by administrators/managers, as teachers are not signified as being sufficiently capable of determining such methods themselves. Power is thus usurped from teachers-as-workers and as they are controlled by ever increasing surveillance methods (Apple, 2004; Apple & Beyer, 1998; Au, 2011;

Braverman, 1998; Carlsson, 1988; Noble, 1994). In Au's view, through a system of rewards and punishments, current reforms standardize not only tests but also the content of the curriculum, the form content takes in classrooms, as well as teachers' pedagogies, with teachers becoming "alienated executors of someone else's plans" (Apple, 1999, p. 118; Sahlberg, 2016).

Long ago Althusser (1970) argued that in mature capitalism, the leading driver of the "Ideological State Apparatus" is the educational ideological apparatus. It is the only Ideological State Apparatus that has the obligatory totality of children's attendance for eight hours a day, five days a week, for twelve years. To Althusser, the educational ideological apparatus conceals its true nature: that which stuffs children with the necessary bourgeois ruling ideology that continues to reproduce the current conditions of production. Furthermore, the ruling bourgeois ideology in schools hides its true nature, presenting schooling as

as a neutral environment purged of ideology... where teachers respectful of the 'conscience' and 'freedom' of the children who are entrusted to them (in complete confidence) by their 'parents' ... open up for them the path to the freedom, morality and responsibility of adults by their own example, by knowledge, literature and their 'liberating' virtues. (n.p.)

Althusser (1970) laments that it is the rare teacher who attempts to teach against this ideology, and that most have no suspicion of the crushing weight of the system, so their blind devotion "contributes to the maintenance and nourishment of this ideological representation of the school" (n.p.). Today, the factory production model in education continues alive and well via policies that mandate standardization, encourage the narrowing of the curriculum

and of teaching (Carhill-Poza, 2018; Enright, 2010; Palmer & Snodgrass Rangel, 2011; Sahlberg, 2016), increase surveillance via testing, and control the profession through a system that assumes assessment objectivity (and that a standard norm is a common measurement for all individuals) and denies individual, contextual, and local variability and difference (Au, 2011; Sahlberg, 2016).

After having presented a critical democratic theoretical framework, and having added a sociocultural conceptual framework to explore policy as appropriation and as a social practice of power, I have now concluded my brief review of larger policy trends framing the emergence of the standardization movement. Next, I turn specifically to ELD standards in the U.S. and in Massachusetts.

The American Context and the Policy of (English) Language

Before NCLB (2002), there were no specific international or national standards for English as a Second Language (ESL) teachers (Harper & de Jong, 2009a), and educational reforms largely left out considerations for MCMLs (N. Lee, 2012; D. Short, 2000). ESL educators were concerned that standardization reforms were leaving out their students and their curricula, and their advocacy gave birth to the first voluntary, international ELD standards (at the time called ESL standards), published by TESOL in 1997 (Snow, 2000; TESOL, 1997).¹⁰ A number of supplemental texts followed their release with the intent to clarify and illustrate the standards in practice, and to offer suggestions for incorporation of the standards into the contexts of teacher training, professional learning, and assessment (Agor & Briggs, 2000; Irujo, 2000; Samway, 2000; D. Short, 2000; D. Short et al., 2000;

¹⁰ TESOL is the largest professional organization for teachers of English as a second or foreign language.

Smallwood, 2000; Snow, 2000; TESOL, 1997, 2001). In the pre-NCLB era, the TESOL standards were used selectively in teacher licensure programs and by some ESL/bilingual classroom teachers (Fenner & Kuhlman, 2013; Varghese & Jenkins, 2005).

Whereas some states already had their own ELD standards and assessments prior to NCLB, the legislation now required a more research-based approach, focused not only on general English proficiency, but on a kind of proficiency that would enable students to achieve academically (Assessment and Accountability Comprehensive Center, 2009). More specifically, Title III of NCLB required that a) ELD standards and assessment were aligned with state academic standards and assessments; b) that they include the four domains of speaking, listening, reading, and writing; and that c) for the first time, states receiving federal funds report on the educational progress of MCMLs as measured by English Language Proficiency (ELP) assessments and their academic assessment data (Harper & de Jong, 2009; Morita-Mullaney, 2016; Short, 2000; U.S Department of Education, 2001). Thus, for better or for worse, NCLB officially sanctioned standards-based education reform for MCMLs.

While NCLB stated the goal of equitable academic achievement for MCMLs and proficient English speakers, it paradoxically overlooked the needs of MCMLs in many ways (Abedi, 2002; Harper et al., 2008; Harper & de Jong, 2009a; Menken, 2006; W. E. Wright, 2005). Importantly, NCLB replaced the Title VII of the Elementary and Secondary Education Amendment (1967) (also known as the “Bilingual Education Act”), with Title III, “English Language Acquisition, Language Enhancement, and Academic Achievement Act” (U.S. Department of Education, 2001), thereby removing all references to bilingual education from federal policy, and leaving all choices about language of instruction to the states. This marked a shift in federal support for the use of home language instruction to a focus on rapid

transition to English with the purpose of preparing MCMLs for English-only academic settings (Crawford, 2004; Gándara & Gómez, 2009; Harper et al., 2008). ESSA reauthorized most of NCLB, and added that ELD standards must address the different proficiency levels of MCMLs (August & Slama, 2016, p. 3).

Whereas NCLB and ESSA require adoption of content-aligned ELD standards, they do not require states to report whether or how ELD standards are implemented, and so no national evaluations of the effectiveness of NCLB on MCMLs have been conducted (N. Lee, 2012). While some scholars credit NCLB for increasing the education system's accountability for MCMLs (Laguardia & Goldman, 2007; Liu et al., 1999), others criticize it for failing to raise the achievement of MCMLs or to increase equity in education (Bielenberg & Fillmore, 2005; Cummins, 2011; Darling-Hammond & Banks, 2010; Harper & de Jong, 2009a).

The WIDA Consortium was born out of this NCLB policy shift. WIDA formed in 2003 as the federal government awarded the Enhanced Assessment Grant to the Wisconsin Department of Public Instruction. The three founding states were Wisconsin, Delaware, and Arkansas. By 2020, WIDA's standards and assessment were in use in 42 U.S. states and territories and in over 500 international locations (WIDA, 2018c; WIDA 2020 internal update). In the 2016-17 school year, WIDA tested 1,947,902 MCMLs in the U.S. through ACCESS, its annual large-scale language proficiency summative assessment (WIDA, 2018b).

The first set of WIDA Standards were published in 2004. A 2007 edition included a resource guide, and the standards were "amplified" in 2012 (WIDA, 2018a). All editions included versions of the ACCESS ELP assessment, fulfilling NCLB/ESSA accountability

requirements. As a reminder, the WIDA *standards* are comprised of five similar and broad statements, and they have stayed the same through the 2004, 2007, and 2012 editions

(WIDA, 2012b):

- Standard 1 – Social and Instructional Language: ELLs communicate for social and instructional purposes within the school setting.
- Standard 2 – Language of Language Arts: ELLs communicate information, ideas and concepts necessary for academic success *in the content area of Language Arts*.
- Standard 3 – Language of mathematics: ... *in the content area of mathematics*.
- Standard 4 – Language of science: ... *in the content area of science*.
- Standard 5 – Language of social studies: ... *in the content area of social studies*.

In its totality, the 2012 edition of the WIDA Standards *Framework* consists of five components: Can Do Philosophy, Guiding Principles of Language Development, Age-appropriate Academic Language in Sociocultural Contexts, Performance Definitions, and Strands of Model Performance Indicators (MPIs) (WIDA, 2012a, 2018a).

Massachusetts Adoption of WIDA

As NCLB came into effect, in 2003 Massachusetts published its own “ELD Standards:” *English Language Proficiency Benchmarks and Outcomes for English Language Learners* (ELBPO). In 2011, when Massachusetts adopted the Common Core State Standards (CCSS) in English Language Arts (ELA) and mathematics, the state was prompted to update its ELD standards (then ELBPO) in order to comply with the NCLB mandate that ELD standards align to academic content standards and assessments (now the CCSS).

Massachusetts was faced with a choice: either update ELBPO or adopt a new set of ELD

standards that would fulfil the requirement of alignment to the CCSS. The WIDA consortium was one of the contenders that offered such alignment, and thus Massachusetts chose to adopt WIDA in 2012.

Massachusetts prides itself in being a leader of standards-driven education. In such a system, state standards serve as a blueprint to drive curriculum, instruction, and assessments. Massachusetts academic standards are intended to be designed with several purposes in mind, including: clearly set forth the skills, competencies and knowledge expected to be possessed by all students at the conclusion of individual grades or clusters of grades; set high expectations of student performance and provide clear and specific examples that embody and reflect these high expectations; express the skills, competencies and knowledge set forth in the standards in terms which lend themselves to objective measurement; define the performance outcomes expected of both students directly entering the workforce and of students pursuing higher education; and facilitate comparisons with students of other states and other nations (MADESE, 2015).

Yet, when the state adopted new the WIDA ELD standards in 2012 (replacing the ELBPO), it chose standards of a different nature for its MCMLs. WIDA standards are broad, dynamic, and generative by design, and do not fulfill the requirements Massachusetts lists for its academic standards, as will be further explored in the next sections. Furthermore, unlike the adoption of the CCSS, WIDA standards were neither augmented nor customized for Massachusetts, nor did they require explicit Board approval as other standards routinely do (Chester, 2011; A. Thomas, personal communication, 2017).

Before launching into a closer look at the challenges associated with the WIDA ELD standards, it is important to mention that WIDA is not alone in its quest to conceptualize and

operationalize ELD standards in a manner that is more effective and practical for teachers working with MCMLs in current standards-based systems of education. Currently in the U.S. there are two consortia and four states that have created their own ELD standards or frameworks, for a total of 6 models that have been adopted by all states and territories. The two consortia are WIDA (2018a), with 40 member states and territories, and ELPA21 (CCSSO, 2014) with 9 states. The four states that have developed their own ELD standards are Arizona (Arizona Department of Education, 2008), California (California Department of Education, 2012), New York (Engage NY, 2014), and Texas (Texas Education Agency, 2011).

Bailey and Heritage (2018) offer a quick appraisal of three of the six current ELD standards/frameworks models. They are apt to praise improvements in the general thinking around recent ELD standards, such as those from the state of California, New York, and ELPA21. These ELD standards and frameworks, like WIDA, correspond to academic content standards (as required by NCLB/ESSA), and focus on the contexts for English language usage in core disciplinary practices and routines – mainly in mathematics, English language arts, and the uses of literacy in science and history/social studies. Bailey and Heritage point out that the articulation of the language needed to engage in various content-area tasks and routines is an enhancement over previous ELD standards, which generally did not focus on capturing the language students most frequently encountered in schools (A. Bailey & Huang, 2011). Yet, Bailey and Heritage still point out that insufficient attention has been paid to the progression of linguistic *content* over time, as for example in the development of a repertoire of word types, cohesive devices, and complex sentence structures. In looking at the example of the New Language Arts Progressions of New York State (Engage NY, 2014), Bailey and

Heritage note that the NY framework describes instructional supports for students to achieve the CCSS English Language Arts standards (Common Core State Standards Initiative, 2010), referring to language use and organization, but failing to provide deeper elaboration of the ways in which specific language features might progress over time.

Overall, in a critique similar to that which has been presented to WIDA, Bailey and Heritage reaffirm that while current ELD standards serve as a general guide for teachers of MCMLs, they do not have the sufficient specificity needed to describe the incremental development of language that is necessary to support students' acquisition of English in school settings (A. Bailey & Heritage, 2014, 2018). The linguistic content that current ELD standards and frameworks (WIDA, ELPA21, California, New York) present is insufficient to help teachers attain the needed level of detailed knowledge required to not only understand new language development but to also act on that understanding to continuously advance language and content.

Challenges Associated with WIDA Standards: Two Lenses

Here I examine challenges associated with classroom implementation of WIDA standards from two lenses: 1) WIDA as a product and conveyor of the national standardization and accountability movement; and 2) WIDA as resistance to the standardization movement.

WIDA Standards as Conveyor of the Standardization and Accountability Movement

When working in an established standards-based educational system, in order for standards to be helpful to teachers and beneficial to students, teachers must know how to use standards to support rich and effective teaching and learning (Perks et al., 2016, p. 2). A standards-based system is at least in part predicated by the notion that teachers need clarity

from standards so that they can focus on their essential roles: “creating engaging learning environments and delivering excellent instruction, assessing and responding to the demonstrated needs of their students, and continuously improving their craft” (Wiener & Pimentel, 2017).

Whereas the WIDA standards offer great flexibility to educators, members of WIDA’s own research team have noted that: “the ambiguous and generative nature of the WIDA standards adds another layer of work to create [another] set of standards which forces teachers to create shortcuts” (Westerlund, 2014, p. 134), and that “the standards do and will continue to have important limitations....The abstractness and flexibility that characterize them are a significant drawback to their use by many ESL and most general education teachers” (Molle, 2013, p. 13). Other noted researchers in the field concur that while the WIDA Standards Framework has some strengths, it does not offer “the descriptions of linguistic and discourse features with the degree of specificity necessary for teachers to create [ELD] curricula” (A. Bailey & Huang, 2011, p. 359). Bailey and colleagues further noted that ELD standards should provide both detailed descriptions of the “degree of complexity of the lexical and grammatical forms expected of students at each level” as well as the language demands required for demonstrating content-area mastery (Bailey, Butler, & Sato, 2005, p.25). The Understanding Language Initiative recommends that ELD standards specify key language functions, and include discipline-specific target language uses expressed in meaningful progressions (2012, p. 2). It is important to note that in 2016, WIDA did release the “Key Uses of Academic Language,” thus partially providing some of those recommendations. Still, practitioners have widely reported that, while WIDA offers useful tools, the current 2012 Edition of the WIDA Standards Framework is not streamlined enough

to provide concrete, user-friendly ways to design curriculum and plan instruction (MADESE, 2016).

In a recent paper, Okhee Lee (2018a) argues that WIDA standards also fall short in “accurately reflecting disciplinary practices and maintaining consistent cognitive expectations,” (p.1) and they “lack sufficient specificity to ensure that ELs are supported to engage in a wide range of disciplinary practices across content areas” (p. 4). Lee maintains that these shortcomings pose problems for operationalization into language use. She further contends that defining what counts as “language” and what counts as “content” is another challenge inherent to the standards that must be faced head on by both standards writers and practitioners alike.

At the very core of WIDA standards is not only the concept of “language,” but more specifically, that of “academic language.” Anstrom, DiCerbo, Butler, Katz, Millet, and Rivera’s (2010) review of the literature reveals that research on academic language is at best uneven and still evolving. Kibler and Valdés (2016) confirm that the definition of academic language is still a contested matter, and they as well briefly touch upon the concern over how ELD standards represent particular constructs of language, warning that “consensus-based standards are created and assessed according to particular views of language in particular contexts” (p. 109).

Flores (2015) points out that MCML’s academic struggles are often blamed on their failure to acquire academic language. But when Flores poses the question “what exactly is academic language?” he generally hears responses closely related to Cummins’ (2008) concepts of Basic Interpersonal Communication Skills (BICS) and Cognitive Academic Language Proficiency and (CALP). This construct poses that social language, or BICS, is

contextualized, interactive, and less complex than academic language. Academic language, or CALP, on the other hand, is described as the decontextualized language of schooling, or language that is associated with specific content areas (Cummins, 2008). Yet Flores and others¹¹ see this distinction as flawed, as they “reify a rigid dichotomy between ‘academic’ and ‘non-academic’ language that has little basis in actual language-in-use” (Flores 2015). To Flores, the erroneous separation of language into “academic” and “non-academic” forms continues to foment a deficit perspective of Latino and other language-minoritized students, who when viewed through this narrative, are perceived to come to school without a strong foundation in academic forms. According to Flores, this perspective is so pervasive that even when Latino children use complex, “academic” language, teachers still perceive them to lack a strong foundation in academic language. Flores then calls for “a moratorium on uncritical framings of academic language as an objective set of linguistic forms that are dichotomous with the playground language of Latinos and other language-minoritized students,” and advocates for “a new conceptualization of language that is situated within a larger critique of racial inequalities that current conceptualizations of academic language normalize” (n.p.). While Flores does not do away with the discussion of academic language altogether, he refuses current understandings of the construct.

Blair (2016) also provides a more nuanced conceptualization of academic language. Unlike Cummins (1984, 2000, 2008) and Scarcella (2003), who view academic language as a largely unified and stable, Blair sees academic language as “one of many overlapping patterns of language, with related ways of doing, being, and valuing (Gee, 1990) that are

¹¹ See also Celce-Murcia’s discussion of Lemke and Hawkins, pp. 377-379

acquired and used by individuals and groups while engaged in the activities of the various discourse communities in which they participate (Gutiérrez & Rogoff, 2003; Heath, 1983; Rymes, 2010)” (2016, p. 110). While Blair identifies meaningful patterns of language use associated with specific activities, she simultaneously acknowledges “the porous nature of discourse communities” (p. 110). In other words, the ways particular groups use language (discourse communities), are not hermetically compartmentalized into particular disciplines but can blend and move more fluidly in and out of different contexts, so in reality there is no clear boundary between the language used at school and the language of social situations (Blair, 2016, p. 110). Blair also reminds readers of Gee’s (1990) position that discourses are “inherently ideological and historically situated” (p. 110). This opens the way for a poststructural view of language and language learning that can shift away from hierarchical structurings in various ways, including that of the normative monolingual perspective. In the end, locating a monolingual bias in simplistic academic/social language binary, Blair takes both a pedagogical and ideological stance, and argues that embracing multiple and varied repertoires of languages that are multimodal and multilingual would enhance MCMLs’ academic potential.

Beyond the discussion of “academic language,” the theoretical shift toward poststructuralism questions the very construct of “language” as an autonomous and static system (García & Menken, 2010). For example, in *Desinventing and Reconstituting Languages*, Makoni and Pennycook (2006) question the ontological status of language, and focus instead on how languages and metalanguages have been invented as part of nationalistic and colonial processes. García, Zakharia, and Otcu (2012) disrupt constructs of ‘heritage language’ and ‘English-only.’ Heller (2007) epistemologically repositions language

as a sociopolitical construct derived from globalized neoliberal economic processes of domination. García and colleagues' work on translanguaging (Blackledge et al., 2010; Celic & Seltzer, 2011; Creese & Blackledge, 2010; García, 2008, 2011; García et al., 2012, 2016; Sánchez et al., 2018) adds to the chorus of scholars (Blommaert, 2010; Canagarajah, 2011; Heller, 2007; Pennycook, 2005; Petrovic, 2014) who ask what language education policy might look like if language is no longer granted a prior ontological status, and if they concentrate instead on the socioeconomic and sociopolitical effects of such a change.

Along with other scholars (Anyon, 2005; Apple, 2006, 2018; Au, 2008; Cairney, 2011; Hantzopoulos, 2008; Meier, 2000b; Nolan, 2018; Norton & Toohey, 2004; Sampson, 2018), García and Menken (2010) call attention to the effects of a neoliberal economy that promotes the privatization of education as a profit-making avenue, thereby perpetuating socioeconomic inequality and the protected status of the dominant class. The authors specifically discuss this phenomenon as applied to language policies in the U.S. that narrowly define academic language, thereby continuing to ascribe failure and blame to language-minoritized students. In addition to implicit and explicit language policies, they also point to the CCSS as one of the drivers for increasing regimentation of language practices in schools, with the result that, as policy continues to narrow the definitions of “appropriate language” for schooling, it effectively continues to undermine, delegitimize, and marginalize the complex language practices of diverse speakers.

Concluding the review of the literature on challenges associated with the WIDA standards from the perspective of WIDA as a product and conveyer of the standards and accountability movement, WIDA standards appear to fall short in the necessary specificity and sufficient user-friendliness for practitioner interpretation and application (and some

critics might argue, also lacking on their accuracy and alignment to content standards). On the other hand, exploring the WIDA Standards Framework from the lens that it may stand as covert resistance to the standardization movement presents a different picture.

WIDA Standards as Resistance to the Standardization and Accountability Movement

The WIDA framework is “purposefully eclectic” (WIDA, 2014, p. 6), drawing on multiple theories and approaches, many of which do not lend themselves well to NCLB/ESSA’s standardization or to the education production model of the factory line and scientific management described by Au (2011). In this section, I select a few themes from WIDA’s Guiding Principles (2010) and Theoretical Foundations (2014) to illustrate the point.

While NCLB removed references to bilingual education in the legislation, WIDA’s Guiding Principles of Language Development (2010) present research backing to show that: “Students’ languages and cultures are valuable resources to be tapped and incorporated into schooling;” “Students’ academic language development in their native language facilitates their academic language development in English. Conversely, students’ academic language development in English informs their academic language development in their native language;” and “Students’ development of social, instructional, and academic language, a complex and long-term process, is the foundation for their success in school” (p. 1). WIDA’s Theoretical Foundations also indicate that “language development occurs over time and depends on many factors,” and that learners progress along “a number of paths toward progress” (p. 3). Here, WIDA presents sustainable bilingualism as a value to be incorporated into schooling and argues against setting a short, arbitrary amount of time for rapid transition to English.

WIDA's Theoretical Foundations further support the idea that language is a socially-contingent, semiotic resource for meaning-making; briefly mention translanguaging; and acknowledge that "languages are hybrid in nature, [and] grammars are emergent and communication is fluid" (p. 8). Thus, even while critics note WIDA's shortcomings as it struggles to define "language," the Theoretical Foundations loosely define it via communicative competence (p.4), and in the section titled "View of Language Development," WIDA points to some of the current questionings about the nature of "language" (Blackledge et al., 2010; Canagarajah, 2011; Celic & Seltzer, 2011; Creese & Blackledge, 2010; García, 2008, 2011; García et al., 2012, 2016; Makoni & Pennycook, 2006; Sánchez et al., 2018).

WIDA (2014) borrows as well from Systemic Functional Linguistics,¹² positing that "language is a social semiotic system, constructing and deriving meaning in context (Halliday & Hasan, 1985)" (p. 5). WIDA acknowledges that "reading and writing are not neutral activities but are embedded in ideology (Street, 1984)," and that "Language-in-use ... gives way to socioculturally distinctive ways of thinking, acting, interacting, talking, and valuing ... (Gee, 1990)" (p. 5). Finally, WIDA draws from sociocultural theory, embedding precepts such as "Knowledge is co-constructed and mediated (Vygotsky, 1978; Banks, 1993)," and "the social context of learning contemplates students' lives in and out of school (Valdés, 1996; González, 2001)." Thus, I see in these WIDA documents a connection to what García, Zakharia, and Octu (2012) have also acknowledged as important tenets for the

¹² In brief, SFL is a critical theory of language that explores the relationship of language and its functions in social settings.

education of MCMLs: as students make meaning and perform language and cultural practices, they are engaged in more than just learning a language – they are situated in a kind of action that is always in the context of their transnational and transcultural lives (p. 23). Again, WIDA seems to be standing in opposition to NCLB/ESSA’s monocultural and monolingual bias and its call for standardization of language via language standards, even as WIDA paradoxically produces them as a kind of anti-standard.

From the perspective of teacher practice, one challenge with this anti-standard view is the veiled nature of WIDA’s resistance. Although WIDA started in 2002, the “eclectic” Theoretical Foundations were not published until 2014, and it is the rare ESL teacher (and even rarer content teacher) who has ever even heard of the Theoretical Foundations, never mind read or processed it for standards alignment and classroom application. The latter discussed anti-standard view presents pedagogical stances and philosophies of learning that serve well to inform instruction, while the dynamic and generative nature of the standards offer teachers potential freedom and spaces for authoring. However, traditional content standards systems and the WIDA Standards Framework operate in radically different ways that have not “talked” to each other well enough, and thus teachers have been left to figure out how to connect the mismatched and moving gears of the various complex systems. One way to operationalize WIDA from the “anti-standard” perspective is to dissolve the idea of language standards altogether and approach them instead as practices for linguistic differentiation, scaffolding, and supports. Yet, this is not the general federal, state, district, and school standards system that teachers are indoctrinated and evaluated in; it is not their *habitus*, and so it is difficult for teachers to get a full understanding of the contradicting

contexts and get a “feel for the game” (Bourdieu, 1990), so that what WIDA offers remains ethereal and difficult to grasp.

WIDA was born out of NCLB, and receives most of its funding from the high-stakes English language proficiency assessment (ACCESS) that is a central component of the standardization and accountability movement. As in the case of Massachusetts, the primary reason states join WIDA is that it presents a solution to comply with ESSA’s requirement for ELD standards and assessment that are aligned to states’ academic standards. WIDA performs most of the arduous and deeply technical work of demonstrating correspondence and validity of standards and assessments to fulfill federal requirements. Being a large Consortium, the 5 WIDA standards must remain sufficiently broad for alignment to all state standards, especially as the national movement for the CCSS falls apart and individual states create their own versions of college-and-career-ready standards. WIDA must also remain politically palatable to all members, so that even when it wishes to challenge official discourses of monocultural, monolingual, and racial bias, it must do so carefully so as to not lose the more conservative states and their funds. But is this what is best for the teaching and learning of MCMLs?

Perhaps WIDA too found its own way to dance with power, to influence the work of education of MCMLs through negotiation and covert reconstruction of federal NCLB/ESSA policy requirements, and it too engaged in policy appropriation (Bartlett & Vavrus, 2014; Levinson et al., 2009; Sutton & Levinson, 2001) to create some resistance and advocacy for a different paradigm than what NCLB/ESSA offers for the education of our MCMLs. Next, I review empirical studies on the implementation of WIDA.

Studies on the Implementation of WIDA Standards

While there are a few recent studies and discussions on WIDA's relation to content standards (A. Bailey, 2007; A. Bailey & Carroll, 2015; A. Bailey & Huang, 2011; Boals et al., 2015; Fox & Fairbairn, 2011; Lin & Zhang, 2013, 2014; Llosa, 2011; Nguyen, 2012; Sireci & Faulkner-Bond, 2015; Tellez & Mosqueda, 2015), and on the validity of WIDA's ACCESS as an ELP assessment (Chi et al., 2011; Cook, 2014; Geier et al., 2015; McFann-Mora, 2016; Miley & Farmer, 2017; Shahakyan & Cook, 2014), the research continues to be sparse on how educators make sense of and implement WIDA standards at the classroom level.

In WIDA Working Paper, N. Lee (2012) conducted a survey of 150 districts in 16 WIDA states. Participants were asked about their knowledge of ELD standards and assessments; their awareness, training, and use of WIDA reports in the district; and district professional development (PD) plans. With a response rate of 72% and a confidence interval of 6%, Lee determined that survey results were highly generalizable to the WIDA Consortium. Given that findings indicated that 72% of district leads of MCMLs had no formal education in the field of ESL or bilingual education, Lee raised the question of whether districts could be reasonably expected to effectively implement ELD standards and related initiatives. Results suggested that districts needed significant external support to implement WIDA. Lee points out that low district engagement with standards-based MCML education works against the logic of the standards-based reform-movement, making it unlikely that adjustments to curriculum and instruction will be triggered by a lack of progress in academic English or academic achievement. Lee ended her study with a worthwhile

question: “what is the potential of standards-based approaches to improve ELL outcomes?” (p.11).

In another WIDA Research Report, Molle (2013) asked: “Who uses the WIDA standards and why?”; “What difference does the use of the standards make for the instruction of ELLs?”; and “If certain uses of the standards seem to have a beneficial impact on the quality of language instruction, how can those uses be supported?” Participants included 39 educators from 14 districts across 7 WIDA states who were recommended by districts as individuals who had a deeper understanding of the standards and used them to a greater degree than other educators. Even though the first edition of the Can-Do Descriptors was not part of the standards framework, findings indicated that educators mostly used the Can-Do Descriptors, sometimes in ways that are discouraged by WIDA publications (p. 6). Whereas Model Performance Indicators (MPIs) are a core component of the standards framework, Molle found that even in this selective participant group, only some ESL teachers, and no general educators, used them. Molle also found that “district coordinators shape the use of the WIDA standards in powerful ways” (p. 1). Some coordinators believed that teachers should be readers of the standards, while others believed they should be writers of the standards. The main factors Molle found to influence educator use of the standards were their experience as ESL teachers, their knowledge of language development, and the opportunities available for them to unpack content standards and write Model Performance Indicators (MPIs). Molle added that significant time and effort are required to understand the standards. Standards use was also contingent upon the district coordinator’s background knowledge and professional learning opportunities available to them, the tools and professional learning opportunities that coordinators provided for school staff, and on formal

opportunities for collaboration between language and content teachers. Molle also found that “the tools district coordinators provide to (or require from) general education and ESL teachers shape in powerful ways the use of the ELP standards,” and “have the potential to infuse the standards in the everyday practice of teachers in particular ways” (p. 5). Finally, in observing limitations to the WIDA standards, Molle notes that “the standards are generative rather than prescriptive. The abstractness and flexibility that characterize them are a significant drawback to their use by many ESL and most general education teachers,” and that “ultimately, language standards are always incomplete” (p. 13).

In a grounded theory study intended to highlight the voices of low-incidence ESL teachers, Chien (2013) touched upon educators’ experiences with the WIDA standards when Massachusetts joined the Consortium in 2012. Chien reports that educators received conflicting policy messages; insufficient information and lack of guidance from the state and from WIDA; scattered trainings; and a lack of clear direction contributing to confusion and frustration.

In a case study, Westerlund (2014) described the sense-making teachers used in one Minnesota district to implement WIDA standards. Using an implementation science framework, Westerlund contributed three main findings: 1) the process of implementation is “an organic, contextual process which requires individual and collective sense-making” (p. 132); 2) the ambiguity and generativity that are inherent to the WIDA standards demand that educators create their own set of standards and shortcuts; and 3) all educators need professional development, coaching, dedicated collaboration time, and support from leadership “to maintain the focus on language among competing agendas” (p. 2). Reviewing Molle’s (2013) study, Westerlund (2014) concluded that “as empowering to teachers as [the

generative nature of the WIDA standards] may seem, the sheer amount of work ... is a daunting task to a teacher who operates in a sea of competing agendas ... The feasibility of that seems far-fetched” (p. 139).

Karlsson (2015) studied the implementation of WIDA standards via a cross-case analysis of 12 public school districts in Minnesota, selecting participants via a purposeful network sampling. Karlsson noted that WIDA standards have not undergone the same scrutiny as the CCSS, and echoed what others have stated in terms of the limited amount of guidance that exists for implementation on a practical level. Karlsson also expounded on how demanding it is for teachers to implement standards that are dynamic and generative in nature, and pointed to the need for deep understanding of what is involved with WIDA lest the entire implementation process be derailed. The 12 participants reported various levels of implementation in their districts, ranging from minimal to extensive. Districts with lower incidence of MCMLs populations tended to have less success in implementation. Karlsson observed that where WIDA standards were being implemented, they were viewed as scaffolds for differentiation. When viewed as a guide for enhancing practice, “the sometimes overwhelming scope of the WIDA standards seemed to become more manageable” (p. 48). Karlsson remarks that the greatest consensus is that “WIDA standards really are not like standards at all” (p. 51), confirming what Massachusetts teachers have also echoed. Karlsson’s participants’ characterizations of the WIDA standards (as scaffolds for differentiation or as something to enhance practice) differ greatly from how Massachusetts has defined standards and their purpose (previously discussed). Karlsson’s overall findings indicate that many districts have many questions about how to best implement WIDA.

Coulter (2016) found that WIDA standards are “better” than previous Tennessee ELD standards, as measured by comparing the differences between the composite scores of the previous Tennessee ELD assessment and ACCESS. Coulter attributed score improvement to the fact that WIDA standards address “CALP,” whereas the previous Tennessee ELD standards focus only on “BICS,” thus not sufficiently challenging MCMLs. Whereas I do not doubt that previous Tennessee ELD standards needed improvement, Coulter’s study leaves many open questions about theoretical depth and methodological validity.

In a narrative inquiry framed by critical performativity, progressive pragmatism, and circumspect care, Morita-Mullaney (2016) investigated the experiences and performances of “EL/BE” (English Learner and Bilingual) district leaders as they interpreted, mediated, and implemented two sets of ELD standards: Indiana’s ELD standards of 2003, and the subsequent adoption, prompted by pressures related NCLB accountability requirements, of WIDA in 2013. Findings of this study shed light on the marginal status of EL/BE leaders as they negotiate their own understanding of the standards and simultaneously plan implementation with fellow educators. Even while WIDA standards brought “national legitimacy” to their work, “most EL/BE leaders were frustrated with the dense information in the WIDA standards... The learning curve was steep and slow, much like they experienced with the 2003 ELP/D standards” (p. 258). The higher status and privilege ascribed to content standards and leaders is a constant challenge, complicating how the more marginalized EL/BE leaders can position the ELD standards. Morita-Mullaney noted the EL/BE leaders “moved from internal legitimacy of empowerment with the 2003 Indiana ELP/D standards to privileging externally sought and sanctioned state power from the IDOE for the WIDA standards” (p. 263), and remarked that that “although their narratives revealed an external

and sometimes punitive technique for persuading educators to pay attention to the ELP/D standards, it helped leaders identify the spaces where individuals were negotiating understanding of the ELP/D standards” (p. 264).

Elder (2018) conducted a case study in a rural middle school in a Southeastern state to explore the educational practices and perceptions of 5 content area teachers in classrooms that included MCMLs. Elder investigated how teachers used WIDA standards while differentiating and scaffolding lessons. Findings suggest that teachers’ differentiation was not directed by the WIDA standards, and point to a clear need for more professional development around WIDA.

This concludes my review of the history and context of WIDA ELD standards with a focus on the state of Massachusetts. In the past several pages, I examined the larger policy context from which WIDA emerged and its adoption in the state of Massachusetts, and then explored the WIDA standards via two lenses: WIDA ELD standards as a conveyor of the standardization and accountability movement and WIDA ELD standards as resistance to that same movement. Finally, I reviewed existing empirical studies on the implementation of WIDA standards.

The NGESL Project and the Collaboration Tool

In this section, I briefly introduce the NGESL Project and its Collaboration Tool as a joint, field-based project that emerged in Massachusetts as a response to educators’ requests for help in operationalizing the policy of WIDA ELD standards. In 2014 the Massachusetts Department of Elementary and Secondary Education (MADESE) launched the field-based

NGESL Project and, along with its partners, developed the Collaboration Tool.¹³ It is important to highlight that mobility for this project began in the voices of teachers.

The Collaboration Tool is a multi-layered, multi-purpose tool designed to help educators more meaningfully implement the “ambiguous” WIDA standards in conjunction with state standards. It asks teachers to collaborate and helps to prioritize and strategically plan around WIDA’s Key Uses of Academic Language in the context of key academic practices (MADESE, 2016). Its goal is to support collaborative curricular planning and delivery with the intentional, simultaneous development of language and standards-based concepts and analytical practices.

Four areas are central to the NGESL Project and its Collaboration Tool:

- a) the simultaneous development of language and content;
- b) the importance of collaboration between language and content teachers;
- c) prioritization of high-leverage language: since teachers have limited time with students, they need ways to strategize and prioritize high-leverage language functions to help organize teaching and learning; and
- d) the project’s pedagogical grounding.

¹³ The Collaboration Tool can be accessed at:
https://wida.wisc.edu/sites/default/files/Website/State%20Pages/Massachusetts/MA_Collaboration_Tool.pdf.

For more information on the Collaboration Tool, please see the Interactive Guide to the Collaboration Tool (download for full interactivity):
https://wida.wisc.edu/sites/default/files/Website/State%20Pages/Massachusetts/MA_Collaboration_Tool_GUIDE.pdf

See also Chapter 3 of the Next Generation ESL Curriculum Resource Guide:
<http://www.doe.mass.edu/ell/curriculum/ResourceGuide.pdf>

Each of these areas will be further explored in undertaking this study to explicate how the NGESL Collaboration Tool was designed to promote processes that simultaneously advance language and content. Here, I present a snapshot of the 2-page Tool and name its eight sections, which are designed to generate collaborative discussions that can inform rich, contextualized, language-driven curriculum planning as the Tool strategically interweaves cross-cutting academic practices with linguistic prioritization strategies. They are:

1. Connection to the language of an academic area(s)/WIDA Standards
2. Grade-level content connection
3. Key uses of academic language (macro functions)
4. Micro functions
5. Key academic practices
6. Performance definitions
7. Thinking space 1: creating Focus Language Goals (FLGs)
8. Thinking space 2: language as action and contingent feedback

The Collaboration Tool is examined in much greater detail in Chapter 4. Please note that the snapshot of the Tool below is for reference purposes only, as the actual tool contains many hyperlinks for full functionality.

Figure 1. Static snapshot of the collaboration tool.

<p>Content Area Connection: This unit will address the language of the following content area(s) or WIDA Standard(s): <input type="checkbox"/> SL <input type="checkbox"/> L <input type="checkbox"/> LoLA <input type="checkbox"/> LoMa <input type="checkbox"/> LoSc <input type="checkbox"/> LoSS <input type="checkbox"/></p> <p>Specific Academic Context: Language development for this ESL unit will be contextualized in the following substantive topic derived from grade-level units, themes, or cluster of standards:</p>		<p>Collaboration Tool</p> <p>View the Interactive Guide to the Collaboration Tool</p>					
<p>Key Academic Practices and/or Standards</p> <p><i>Key academic practices may be replaced with the state standards themselves.</i></p> <p>In listening, speaking, reading, and writing with literary and informational language...</p> <p>Engage with complex academic language</p> <ul style="list-style-type: none"> Participate in grade-appropriate exchanges of information Produce clear and coherent language in which the development, organization, and style are appropriate to task, purpose, and audience Support analyses of a range of complex texts with evidence Use English structures to communicate context-specific messages <p>Use evidence-based communication (with opinions, claims, concepts, arguments, or ideas)</p> <ul style="list-style-type: none"> Paraphrase Analyze Summarize Challenge State (name) your own Support with reasoning and evidence <p>Carry out research</p> <ul style="list-style-type: none"> Plan and carry out inquiries Evaluate sources Build and present knowledge through research by integrating, comparing, and synthesizing ideas Communicate research findings <p>Take part in collaborative interactions</p> <ul style="list-style-type: none"> Build on the ideas of others and articulate your own Request clarification Discuss key points 	<p>Language: Key Uses of Academic Language</p> <p>Macro Functions</p> <p>RECOUNT</p> <p>EXPLAIN</p> <p>ARGUE</p> <p>DISCUSS</p> <p><i>"DISCUSS" points to the importance of the oral, interactive component of all the academic practices.</i></p>	<p>Micro Functions</p> <p>Select <i>micro functions according to need and context. Click on the links below for sample progressions</i></p> <ul style="list-style-type: none"> Cause/effect Classify Compare/contrast Contradict/disagree Describe Elaborate Evaluate Identify/name/label Inquire Justify Predict Sequence State opinion/claim Summarize Insert any micro function as necessary 	<p>ELP 5</p> <ul style="list-style-type: none"> Multiple complex sentences, presented in a cohesive and coherent manner. Multiple phrases and clauses with patterns characteristic of specific content areas. Academic content-specific, and technical vocabulary. 	<p>ELP 4</p> <ul style="list-style-type: none"> Expanded related ideas in connected discourse with a variety of sentences. A variety of complex grammatical constructions with patterns characteristic of specific content areas. Content-specific and some technical academic vocabulary. 	<p>ELP 3</p> <ul style="list-style-type: none"> A series of extended sentences and related ideas. Repetitive and some complex grammatical structures with patterns characteristic of specific content areas. Some content-specific and academic vocabulary, including cognates. 	<p>ELP 2</p> <ul style="list-style-type: none"> Emerging presentation of ideas in phrases or short sentences. Repetitive, formulaic grammatical structures across specific content areas. General social, instructional, and content words and expressions, including cognates. 	<p>ELP 1</p> <ul style="list-style-type: none"> Single words, phrases, or language chunks to represent ideas. Phrase-level patterns and structures. Everyday social, instructional, and content words and expressions.
<p>Performance Definitions*: Language development is fluid and dynamic. Levels are not static, and can be different in different domains.</p>		<p>Thinking Space 1: Develop unit-level Focus Language Goals (FLGs) in the context of grade-appropriate topics and standards. FLGs should always include at least a language FUNCTION and a KEY ACADEMIC PRACTICE or content STANDARD stem.</p> <p>Below are adaptable "formulas" for creating FLGs to arrive at UoD unit Stage 1 goals.</p> <p>Key Use (macro) + key academic practice DISCUSS by building upon ideas of others and articulating your own claims.</p> <p>Key Use (macro) + micro function + key academic practice ARGUE by stating a claim supported with reasoning and evidence.</p> <p>Key Use (macro) + state standard stem RECOUNT to delineate a speaker's argument and specific claims, distinguishing claims that are supported by reasons and evidence from claims that are not. (ELA-Literacy SL.6.3)</p> <p>Key Use (macro) + micro function + key academic practice + substantive topic EXPLAIN by describing cause and effect to participate in grade-appropriate exchanges of information about the role that human activities have played in causing the rise in global temperatures. (STE 8.MS-ESS3-5)</p> <p>Write your FLG here:</p> <hr/> <hr/> <hr/>					

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Collaboration Tool: PAGE 2

***Please note:** "Students may demonstrate a range of abilities within and across each ELP level; second language acquisition does not necessarily occur in a linear fashion within or across proficiency levels. ...At any given point along their trajectories of English learning, ELLs may exhibit some abilities (e.g., speaking skills) at a higher proficiency level while exhibiting other abilities (e.g., writing skills) at a lower proficiency level.Since, by definition, ELL status is a temporary status, an ELP level does not categorize a student (e.g., 'a Level 1 student'), but, rather, identifies what a student knows and can do at a particular stage of ELP (e.g., 'a student at Level 1' or 'a student whose listening performance is at Level 1')." (Shafiq Willner, 2013b).

THINKING SPACE 2: Language as Action and Contingent Feedback

Consider: *If we plan language teaching with the end goal of college and career readiness in mind, we must consciously develop the key academic practices and habits of thinking that support student success in general education and ESL classrooms.*

1. Established goals	What are the desired learnings/FLGs? (At the lesson level, consider this in terms of your lesson's language objectives.)
2. Gather evidence	In relation to instructional goals: what do I observe in my students' work? What can my students currently do?
3. Teacher moves	<p>What do I do with student evidence?</p> <p>Based on observable student actions, how do I plan my next moves to most effectively support my students' development?</p> <p>What pieces come first, second, third, etc., as we focus on language development through Key Uses of Academic Language and key academic practices?</p> <p>How do I support my students and scaffold their learning?</p> <p>What types of contingent feedback might I give to students based on what I see in their performance?</p> <p>How will my teacher feedback help students take action to achieve established learning goals?</p>
4. Student moves <i>For particular purposes, in specific contexts, together with other learners, and with certain outcomes.</i>	<p>What types of moves do my students need to make to increase language proficiency and advance toward college and career readiness?</p> <p>What language will I hear and/or read from students as they engage in different activities?</p> <p>How will students monitor and assess their own individual progress toward established goals?</p>

Conclusion

This dissertation begins, through its title and preface, with an acknowledgement that politics and power influence our experiences in the educational system as students and professionals. It acknowledges a desire to cross borders, to weave through the changing tides of external authority and to dance with power, with languages, identities, cultures, and more.

At a high level, this study symbolically asks how educators maneuver power to creatively and intentionally engage with policy in their classrooms. These abstract and ethereal concepts become more tangible through the identification of a particular catalyst for policy negotiation: educators in Massachusetts raised a loud cry for help and pointed out the challenge of meaningfully implementing ELD standards within their larger educational systems and contexts. Using a critical democratic theoretical framework, and a conceptual framework of policy as a social practice of power, the paper opens up spaces to position classroom educators not as simple receivers of policy (just as students should not be positioned as simple receivers of banked education), but as agentive historical subjects who have the potential to engage with the conditions of educational production. They must be reckoned with as legitimate actors – whose identities, internal experiences, beliefs, and ideologies, as well as the sociopolitical and sociocultural contexts in which they exist – must be accepted as an inevitable part of the policy process. Complete power, after all, cannot lie solely within the hands of policymakers.

A critical sociocultural democratic stance legitimizes educators' questioning, negotiation, and appropriation of policy – throughout multiple complex social practices and across various institutional contexts. In the case of WIDA as ELD policy, I presented evidence to demonstrate that there are significant challenges to implementation, and previous

studies to show that WIDA standards require an extra “layer” in order to be made sense of, and to be implemented with any measure of success. This appears to be a case where educator experience and expertise is a requirement, an a priori to make the system work. Yet, as my review of recent education policy and its critiques demonstrates, classroom educators are not often allowed the opportunity to be positioned as leaders, researchers, and intellectuals, nor to participate in communities of official meaning-making discourse and practice.

The NGESL Project represents one instance of a more democratic, field-based, local approach that functions as this “extra layer” to make sense of and implement WIDA. How does participation in and application of the NGESL Project shape educators’ understandings and actions around the implementation of ELD standards?

Better understanding the sense-making process and appropriation of WIDA standards, as adopted in 40 U.S. states and territories and over 500 international locations, has several implications. On a technical level, it can influence understandings and designs of policy processes; teacher preparation; professional learning; and the development of future standards and related tools. At a theoretical level, it adds to a body of literature that endeavors to: increase our understanding of the contextual, cultural, and political aspects of policy processes; open up more democratic spaces for decision-making in public education; expand and decentralize sites of legitimized knowledge-making; question the meaning of policy in practice; and interrogate how power continues to move and operate in educational contexts.

CHAPTER 3

METHODS

This chapter is organized into 5 main sections. The first section presents a rationale for the case study method of inquiry used in this research. The second delineates the “Tiered Case Study Design and Timeline.” The third discusses “Methods, Procedures and Instruments,” and includes exploratory data collection, selection of participants and sites, ethical considerations, approach to interviews and focus groups, recording and transcription, coding, document analysis, secondary data analysis, primary survey questionnaires, research journal, research database, and researcher positionality. The fourth section describes my approach to “Data Analysis,” and the fifth and final section of this chapter addresses the “Case Study Trustworthiness: Validity, Reliability, and Generalizability.” Combined, these elements are seen as central features of the case study research approach (Aaltio & Heilmann, 2012; N. K. Denzin, 2009a; Dyson & Genishi, 2005; Hamilton, 2018; Merriam, 1985; A. J. Mills et al., 2009; Platt, 1992; Timmons & Cairns, 2012; Yin, 1981, 2017). Chapters 4 and 5 present the findings, and Chapter 6 discusses implications, recommendations, and limitations.

Case Study Rationale

In Chapter 1, I laid out theoretical and conceptual frameworks that point to complex, multiple layers of sense-making and negotiation in educational policy that eventually make

their way to the classroom level, as in Ricento and Hornberger's (1996) policy onion and Levison et al.'s (2009) "Education Policy as a Practice of Power." This messy complexity of human experience makes case studies in the qualitative or interpretive traditions appealing (Erickson, 1986). The case study is also a suitable approach to examine instances when policy is created to solve a problem that does not necessarily work in practice (Collins & Noblit, 1978; Timmons & Cairns, 2012), and is a useful approach to bridge academic research and the work-life of practitioners (Aaltio & Heilmann, 2012).

A case study is a systematic way to empirically examine a contemporary phenomenon in depth and in real-life context. It relies on several sources of information and benefits from prior theoretical propositions to guide data collection and analysis (Yin, 2017). It is frequently termed a "bounded system" (Dyson & Genishi, 2005; Tobin, 2012; Yin, 2017), although postmodern scholars challenge the notion of stable or clear boundaries (Elger, 2012; Moriceau, 2012). It has roots in humanistic traditions such as the study of literature (Aaltio & Heilmann, 2012), as well as in phenomenology, ethnomethodology, and symbolic interactionism (Patton, 2001). This type of qualitative inquiry emphasizes "the necessity for grasping the actors' viewpoints for understanding interaction, process, and social change" (Strauss, 1987, p. 6). The case study has been used in medicine, law, anthropology, political science, psychology, and social work (Merriam, 1985), and has also grown in use in education research. The case study can, at the least: a) provide descriptive information and 2) suggest theoretical relevance (Tobin, 2012).

The research questions driving this study determined the tiered nature of this case, as well as the best empirical methods to answer them. The use of the Next Generation English as a Second Language Project's (NGESL) Collaboration Tool takes place within historical,

political, economic, cultural, institutional, and local contexts; as well as through myriad simple and complex, abstract and concrete individual and collective sense-making strategies. As such, the general quantitative research emphasis on operationalizing variables, statistical analysis, and renormalizability is not well suited for it (Auerbach & Silverstein, 2003). Instead of surveying a limited number of variables across copious cases, the case study intensively investigates the interplay of all variables in order to provide – as much as possible – a total understanding of the phenomenon (Merriam, 1985). In addition to allowing “for a level of understanding and explanation not possible through conventional experimental or survey designs” (Merriam, 1985, p. 204), the case study approach affords the opportunity to conduct the study in a real-life context, and to contribute to a case-specific theory of the natural development of the processes involved, such as in the use of the NGESL Collaboration Tool (Dyson & Genishi, 2005; E. Guba & Lincoln, 2011; Hijmans & Wester, 2012; Yin, 2017). Additional benefits of the case study method include its power to answer “how” and “why” questions (Dyson & Genishi, 2005; Timmons & Cairns, 2012; Yin, 2017), such as the ones driving my research.

Tiered Case Study Design and Timeline

The purpose of my study was to explore how the “local layer” that is the NGESL Collaboration Tool might facilitate the work of education actors to plan curricular units that simultaneously develop language and content as a proxy for that central aspect of English Language Development (ELD) standards implementation. The case was thus defined as a study of the NGESL Collaboration Tool as a way to operationalize ELD standards in Massachusetts.

The table below lists data collection strategies corresponding to three tiers of the case, including data sources and the timeline for data collection. For robust exploration, I built on preliminary, exploratory research to then develop three tiers of the case to offer both depth and breadth of understanding. Although there is no clear cutoff point to end data collection in a case study (Yin, 2017), saturation was reached when additional sources did not bring any significant new data (Aaltio & Heilmann, 2012; Auerbach & Silverstein, 2003).

As the table below indicates, I built on preliminary research and used multiple data sources, a hallmark of case study research and a strategy to enhance data credibility (N. K. Denzin, 2009a; Dyson & Genishi, 2005; Evers & Staa, 2010; Patton, 2001; Yin, 2017). The primary sources for this study included document analyses, focus groups, and in-depth interviews. I also relied on survey questionnaires, analyses of secondary data, informal interactions with participants, and my own memos and field notes.

Table 1

Data Collection Overview

Data Collection Strategy	Primary Data Source	Secondary Data Source	Timeline
Preliminary, Exploratory Data Collection			
Observations, interviews, memos, document analysis	As described in the narrative below, as part of my job for the Massachusetts Department of Elementary and Secondary Education (MADESE), I was deeply embedded with field participants and the development of the NGESL Project and its Collaboration Tool.		2014-2018
Tier 1			
Questionnaire 1: Demographics	A pre-interview questionnaire	X	July 2019
Focus Group: Developers	1 Focus group: 8 participants	X	July 2019
Semi-Structured Interviews: Developers	2 key informants	X	July 2019
Follow up questions	2 key informants	X	Aug 2019
Unstructured Interviews: Developer	4 1-hour sessions with 1 key informant	X	Sept-Oct 2019
Document Analysis		X	2018-2019
Video Analysis	Review of NGESL videos in 9 classrooms across state, including annotations and teacher reflections	X	
TIER 2			
Questionnaire 1: demographics	Pre-focus group questionnaire	X	July 2019
Focus Group: MA Users of Tool	1 Focus group: 8 participants	X	July 2019
Focus Group: MA Users of the NGESL and Tool	X	Northeast Comprehensive Center (NCC): 3 focus groups with a total of 14 participants	Data review summer-fall 2019
Survey Questionnaire: MA Users of Tool	54 responses		July 2019

Data Collection Strategy	Primary Data Source	Secondary Data Source	Timeline
Survey: MA Users of the NGESL Project and Tool	X	NCC Survey: 222 responses	Data review summer-fall 2019
Document Review: Professional Development (PD) Evaluations	Review of NGESL PD records from 6 sessions offered in 2019.		Data review fall 2019
Interviews: 3 MA high schools & the NGESL	X	Leathers et al. 13 individual interviews in three high schools about use of the NGESL Project	Data review summer 2019
Document Review: other reports	X	<ul style="list-style-type: none"> • NCC Report on the NGESL Project • Leathers et al. report on NGESL use across three high schools 	Data review 06/2019
Tier 3			
Document analysis	<ul style="list-style-type: none"> • Analysis of 2 NGESL units developed by teachers at Bay School • Review coaching records for 2 teachers while they were writing units based on the Collaboration Tool, and for teachers piloting 2 different NGESL units • An early in-district curriculum development reference tool, an “expanded planner,” full curriculum map, and curricular theme map In-district professional development facilitator notes and records	X	Data review summer-fall 2019
Video analysis	Review videos of 2 NGESL lessons (developed with Tool) being taught in 2 classrooms at Bay School. Raw videos contain teacher reflections and final videos contain annotations.	X	Data review summer-fall 2019
Questionnaire 1: Demographics	A pre-interview questionnaire	X	July 2019
Focus Group: users at Bay	1 Focus group: 8 participants	X	July 2019
Semi-Structured Interviews at Bay	2 key informants	X	Aug & Sept 2019

Data Collection Strategy	Primary Data Source	Secondary Data Source	Timeline
Unstructured interviews: users at Bay School	2 60-minute sessions with one key informant	X	Oct & Nov 2019

Methods, Procedures, and Instruments

The case study approach is multimethod by nature, and one of its features is the use of multiple and complex data sources to achieve a wide, in-depth understanding of a context and its participants (Priola, 2010). The methods and procedures were chosen for how they complemented each other to answer my research questions, to maximize the information related to the phenomenon, to support integration for rich analysis, and to allow for triangulation.

The case study was conducted in a flexible manner (Aaltio & Heilmann, 2012; Dyson & Genishi, 2005; Tobin, 2012; Yin, 2017), so while I started with a well-designed plan, I left room to make adjustments if conditions required it. Although in this methodology there is some openness and room for adaptation as new information is uncovered, the case study remains “one of the most structured qualitative research strategies: essential exploration followed by focused data collection and analysis” (Hijmans & Wester, 2012, p. 15).

Preliminary and Exploratory Data Collection (2014-2018)

Exploratory data collection for this research study began five years ago when I became involved with the NGESL Project and its Collaboration Tool. From May 2014 to May 2019, I worked in close collaboration with the Massachusetts Department of Elementary and Secondary Education’s (MADESE) field-based NGESL Planning Committee, a group made up mostly of statewide language and content teachers and directors. Additional

collaborative partners included Massachusetts Association of Teachers of Speakers of Other Languages (MATSOL), WIDA, the Northeast Comprehensive Center (NCC), and WestEd, among others.

By the end of the development phase of the NGESL Project, over 30 Massachusetts districts representing over 65% of the ML student population from across the state had participated in the development in different capacities. The Tool was then used as a center piece to develop, pilot, and publish 12 model curriculum units; create videos¹⁴ of eight units in action as taught by teachers in classroom across the state; and finally, to develop professional learning offerings that either included the Tool as a central aspect (“NGESL Facilitator Training,” MADESE, 2016b, henceforth known as FacT) or that focused directly and primarily on the Tool itself (“Expeditions in Collaborative Practices: The Collaboration Tool and Multilingual Learners,” MADESE, 2019a, henceforth known as Expeditions). I met officially with representatives from these groups 24 times between May of 2014 and May of 2016. Moreover, I held additional informal meetings and discussions with participants of the aforementioned groups. Meeting agendas, protocols, materials, notes, and attendance records are available in the research database. These experiences and data helped to inform tier 1 of this case study.

It is important to note that educators from the Bay School (tier 3 research site), as well as NGESL developers who participated in the focus groups and interviews, were involved in the NGESL from early on, serving as members of the Planning Committee, unit writing teams, unit piloting teams, filming of the units, and/or developing the NGESL PD.

¹⁴ Units and videos can be accessed at <http://www.doe.mass.edu/ell/curriculum/mcu.html>

Various records from this preliminary data collection period are stored in the research database, including memos and reflections from the Bay School and statewide directors, coaches, and language and content teachers. All of the preliminary data gathered starting in 2014 with educators from the Bay School helped to create a rich tapestry from which I began to build tier 3 of this case study.

Additionally, from 2015 to 2018, I visited various districts across the state to learn about how districts were using the Collaboration Tool and its curricular processes and products, including: Boston (Brighton High School and the Hernandez School), Brockton, Burlington, Chelsea, Fitchburg, Holden, Holyoke, Lowell, Newton, Randolph, Somerville, Waltham, and Wakefield. Researcher memos are stored in the research database. This added to a foundation that informed the research I completed more formally for tier 2 of the case study.

From May 2016 to May 2019, I met at various times with developers of professional learning offerings related to the Tool sponsored by the MADESE. I observed approximately 2-3 full days of the workshops per year (for a total of 10 full observation days), spoke with workshop participants, and reviewed evaluation forms for each workshop. Researcher memos, workshop dates, participant numbers, and workshop evaluations related to the workshops are stored in the database. These experiences and records helped to inform tiers 1 and 2 of this study.

Moreover, I contacted or was contacted by several other practitioners, directors, and consultants who were designing faculty meetings or delivering professional learning offerings across the state that focused on the Collaboration Tool (district-specific or open to other districts), including but not limited to: Boston Public Schools, Boston University,

Burlington, Chelsea, Collaborative for Educational Services, Fall River, Framingham, Fitchburg, Holyoke, Lawrence, Malden, Martha's Vineyard, Medford, the MADESE's Western EL Leadership Network, MATSOL, New Bedford, Revere, Teach Plus, and Worcester. I also attended various presentations related to the Tool by practitioners at MATSOL and other conferences. Memos are stored in the research database, and helped to inform tier 2 of this study. Appendix D offers a snapshot of the preliminary data collected for this study.

Participant and Site Selection

Having access to participants, sites, and available resources was a major factor in the decision to proceed with a case study approach (Timmons & Cairns, 2012). Case study participants are frequently identified through the researcher's own network (Aaltio & Heilmann, 2012). Participants and sites were chosen for several factors, including participant's length of time, depth of knowledge, and level of practice with the NGESL and its Collaboration Tool; participants' own interest; ease of access; convenience; familiarity; and cost.

In qualitative research, purposeful sampling is commonly used for the selection of information-rich cases related to the phenomenon of interest (Palinkas et al., 2015; Riessman, 2008; Timmons & Cairns, 2012). For this case study, I needed to find participants who had lived through and were experts in their own experience (Auerbach & Silverstein, 2003) of being education actors working through practical implementation of ELD standards in curricular units for the simultaneous development of language and content via the NGESL and its Collaboration Tool. In February of 2019, I began to develop a list of potential viable sites and participants by reviewing MADESE records. I created a spreadsheet listing all the

Massachusetts school districts that I could confirm had been involved in some aspect of the NGESL project. I generated separate, successive columns to indicate which districts were involved in the initial NGESL planning committee, unit-writing teams, unit-piloting teams, and/or successive professional development offerings. I also indicated which districts had personnel who elected to undergo training to become professional development facilitators for the NGESL PD courses. I additionally noted turnover of key district personnel who were leading NGESL implementation and kept a column where I could note “latest known activity with the NGESL.” Although this spreadsheet was not fully exhaustive, it served to develop an initial understanding of at least 132 districts across the state and their involvement in the NGESL, and allowed me to identify which districts had been regularly involved with most phases of the project. I created a similar spreadsheet listing organizations and consultants who contributed to project development and sustenance. This spreadsheet allowed me to have a good picture of districts and organizations that would be well suited for each tier of the case.

Selecting one school for the in-depth inquiry of tier 3 required some additional steps. After narrowing down from 132 districts to a final list of roughly 10 potential districts who have been involved in all phases of the NGESL project, I took into consideration distance, ease of access, and familiarity, and noted which districts have gone beyond the NGESL project involvement with the state to also present in conferences and/or engage in other activities related to the NGESL. A couple of districts stood out as well suited for potential research sites. To preserve confidentiality, I am calling the selected site the Bay School in the Blackstone District. The Blackstone’s additional advantages included staff that had been involved with other previous important initiatives that were part of the NGESL’s pedagogical

grounding, including Teemant's (Teemant & Tyra, 2014b) Six Standards of Effective Pedagogy and WIDA PD.

Bay is a Title I elementary school in the Blackstone public school district serving pre-kindergarten to grade four. In 2019 it had 641 students. The ML population has been steadily growing at Bay: whereas in 2016 the ML population was 18%, by 2019 it had grown to 20%, with 36% of students reporting having a first language other than English. The school has a higher concentration of Multicultural and Multilingual Learners (MCMLs) than the district (14%) and the state averages (10%). 69% of students at Bay School are economically disadvantaged, as compared to 62% in the overall Blackstone district and 32% in the state. 56% of students at Bay are Hispanic, 25% are White, 7% are African American, 7% are "multi-race, non-Hispanic, 5% are Asian, and 0.2% are Native American. In 2018, the Bay School was classified as "meeting or exceeding targets" in the state's accountability system, demonstrating better growth than the district as a whole.

I started to learn about the Bay School's involvement with the NGESL in 2014, when Moira, the Blackstone ELD director, joined the NGESL Planning Committee. Bella, the curriculum integration coach, was Moira's partner in the NGESL project. Both Moira and Bella continued to be involved in the NGESL in various ways, eventually becoming facilitators for FacT and Expeditions PD, and presenting about their work with the Tool at conferences.

Olivia, a kindergarten teacher at Bay, participated in writing teams for two NGESL units ("Working Together" and "Emotions / how do I Feel?"), piloted one unit ("Working Together"), and was filmed for one video ("Emotions / how do I Feel?"). Perry, an upper elementary teacher at Bay, was part of the writing team for one unit ("Animals and Where

They Live”), piloted one unit (“Weathering and Erosion”), and was filmed for one video (“Historical Perspectives”). Mabel has been teaching grades two and three at Bay. She was part of the team who wrote and piloted “Animals and Where they Live.” Perry, Mabel, and Olivia also worked with Moira and Bella to develop and deliver some professional development sessions about the NGESL and its Collaboration Tool to educators across the Blackstone District.

During the preliminary data collection phase (2014 to 2018), I met many times with members of Bay School. This included official project development meetings (24 meetings between May 2014 to May 2016); informal interviews and discussions; observation of a full day of professional orientation with unit writers (September 18, 2015); observing several coaching sessions with unit writers (summer/fall 2015); review of reactions and reflections collected from unit writers and piloters, as well as of student work produced during piloting (October-November 2015); observation and informal interviews of two teachers making NGESL videos (spring to June of 2017); a full day observation and informal interviews with Moira and Bella delivering the NGESL FacT PD (FacT, July 14, 2017 in Leominster). Agendas, communications, memos, notes, videos, and various other records are available in the research database.

The formal data collection for tier 3 at the Bay School took place in the spring and summer of 2019. From the 2014-2018 period I reviewed: meeting materials and notes, coaching records, three units that were developed by Bay teachers with the Collaboration Tool (final products and development notes), two units that were piloted by Bay teachers, raw and published videos of two teachers teaching two different lessons from the units in their classrooms, and professional development records related to the Tool at the Blackstone

district and Bay School. I also reviewed curricular tools and maps the Blackstone developed before and after the Tool. In early summer of 2019, I visited the school and spent three hours talking to the principal, ELD director, curriculum integration coach, and 4 teachers. They described past and current approaches around how the Collaboration Tool is used in the school. I continued to deepen my understanding of the processes of how educators at Bay School made sense of and used the Collaboration Tool by conducting a focus group, two individual semi-structured interviews, and two follow-up unstructured interviews with Bella. Throughout the process, I searched for the emergence of unique attributes and patterns, as well as general themes that matched, added to, or challenged the broad data collected from the other two tiers of this study. Examining how education actors working within one school's ecosystem used and made sense of the NGESL Collaboration Tool added in-depth exploration to my study, allowing me to become thoroughly familiar with how the phenomenon works within one particular setting.

Ethical Considerations for Research Participants

Voluntary Consent. The decision of whether or not to take part in this research study was voluntary. If a participant decided to take part in this study, the subject could end participation at any time without consequence. If participants chose not to participate or if they decided to quit (none decided to quit), they did not lose any rights, benefits, or services that they would otherwise have. When participating, individuals could refuse to answer any question.

Confidentiality. Participants' contributions to this research were confidential. That is, the information gathered for this project will not be published or presented in a way that would allow anyone to identify participants. To provide anonymity, the identities of all

participants were protected through a labeling matrix. Participants were invited to choose a pseudonym, and they were additionally labeled according to their roles (English-as-a-second-language teacher, content teacher, special education teacher, coach, director, consultant, curriculum liaison, ELL facilitator, technical assistance provider; schooling levels: elementary school, middle school, high school, or systemwide; and where appropriate the specific grade assignment was noted). The labeling matrix was stored in a password-protected computer and was not linked to the data in any way. All interviews were digitally recorded and transcribed into writing. All documents gathered for this project were stored on a password-protected device. I was the only person with access to the data, which was destroyed at the end of this study. Thus participant information or samples that were collected as part of this research will not be used or distributed for future research studies, even though all participant identifiers were removed.

What Was Asked of Participants. When individuals agreed to join this study, I asked them to participate in an interview (of about 60 minutes) and/or focus group (60-90 minutes). When an issue of particular interest surfaced, I invited individuals for follow-up interviews.

Process to Secure Informed Consent for Study Participation. I presented information for individuals to voluntarily decide whether to participate as research subjects. This included written documentation and a clarifying conversation to discuss: the study's purpose, duration, procedures, risks, benefits, time requirement, the voluntary nature of the study, right to confidentiality, and contact information for any questions and concerns. The process of consenting was ongoing, and I made clear to the participants their right to withdraw at any time, not just at the initial signing of the paperwork. The process was

designed to ultimately assure that participants understood and really “got” what they were signing up for.

Risk and Benefits. This study posed minimal risk to participants. The research risk was no greater than that ordinarily encountered in daily life or routine activities. A possible risk was accidental breach of confidentiality. I did everything I could to protect participant information. Participants were allowed to skip any questions they did not feel comfortable answering, or to stop participating in the study at any time. There was no direct benefit to participants personally for taking part in this study. However, potential benefits of participating included opportunities for educators to engage in in-depth reflection about their practices around standards implementation and the simultaneous development of language and content.

Interviews and Focus Groups

Inquiring about *how* education actors engage in a sense-making processes to implement standards in the age of standardization and accountability immediately places their experiences and viewpoints in a place of prime importance. Here, participants are positioned as experts on the phenomenon being studied because they are experiencing it directly (Auerbach & Silverstein, 2003, p. 7). Guided by a qualitative constructivist paradigm (Lincoln, 1985), I “rel[ied] upon the ‘participants’ views of the situation being studied” (Creswell, 2014, p. 8.), and investigated their multiple perceptions of reality (Miller, 2000) to grasp the ways in which they constructed meaning around the Collaboration Tool and its processes. Via storytelling through interviews and focus groups, participants described their experiences and views of reality, and I was better positioned to understand the participants’ understandings and actions (Lather, 1992). This approach complemented my

theoretical and conceptual frameworks well, as it acknowledges that reality in the social sciences, rather than an external, fixed entity, is co-constructed, complex and diverse, and laden with mutual rather than unidirectional causality (Lincoln, 1985).

Interviews are “dynamic meaning-making occasions that result in a collaborative production of knowledge” (Barlow, 2012, p. 3; N. K. Denzin, 1989). They are a process to seek knowledge and understanding through conversation, allow for a large quantity and variety of data to be collected over a relatively short period of time, and can add great depth and breadth to a study (Barlow, 2012). They can contribute to the researcher’s goal of learning about and comparing participant responses while also endeavoring to fully understand their unique experiences and contexts. According to Kvale (1996), “the qualitative interview is a construction site of knowledge. An interview is literally an *inter view*, an inter change of views between two persons conversing about a theme of mutual interest” (p. 2). Therefore, while pursuing a consistent line of inquiry, my interviews resembled guided conversations that were fluid rather than rigid (Rubin & Rubin, 2011; Yin, 2017).

I followed Auerbach and Silverstein’s (2003) *narrative interview* procedure. It involves asking questions that invite participants to share their histories with the phenomenon in question. The authors recommend asking approximately six “very general questions” (p.16). They suggest asking questions that allow participants to talk about what matters to them in relation to the phenomenon, so they can shed light on the research inquiry. The authors recommend that, rather than adhering to specific questions too rigidly, the interviewer should pursue issues that strike the participants as important (p. 101). Riessman (2008) too suggests that the researcher use open questions and explore with the participants

negotiated openings and turns in the conversation, which requires that investigators give up a certain degree of control. Riessman adds that narrative interviewing is less than a set of techniques and more of a practiced way for investigators to open “dialogic relationships and greater communicative equality” (p. 26).

Case study researchers not only seek multiple perspectives, they also include data from interviews in a continuum that goes from formal to informal (Dyson & Genishi, 2005). Informal interviews in the form of casual conversations before or after the formal interviews, as well as casual interactions with the participants, were also part of this study. Relevant new information and insights during informal interviews were captured via field notes and memos.

While focus groups offer some similar benefits to interviews, they have some complementary features. Whereas interviews allow the research to more fully understand the individual’s experience, focus groups are a flexible and efficient way to get both range and depth of information from a group in a short time, permit the researcher to quickly and reliably get common impressions, add a social dimension to verbal data (Ryan et al., 2014), and allow the researcher to deliberately try to surface the different views of each person in a group (Yin, 2017). In the focus group, I asked targeted questions intended to elicit *collective* views of the phenomenon, and participants engaged with each other as well as with me as the researcher. As multiple schedule and location restrictions demanded, focus group meetings took place online via Zoom. A robust method to examine the meanings of participants’ experiences, the focus groups were used to complement document and video analyses and interviews, thus contributing to the yielding of rich description for the case (Ryan et al., 2014).

Interviews and focus groups asked participants about their experiences with the processes related to the Tool, and specifically how they made sense of it and used it. Interviews lasted for approximately 60 minutes and focus groups for 60-90 minutes. They were managed in four stages: 1) selection of candidates; 2) the interview/focus group; 3) follow-up; and 4) organization of the data. Interview and focus group protocols can be found in Appendices O-R. Appendix J presents a snapshot of the total interviews and focus groups.

Interviews and focus groups proceeded in the following manner: I began sessions with informal conversation to create a climate of ease and comfort. I reviewed the purpose of the research, all aspects of informed consent, and answered any questions. I spoke at an appropriate rate, maintained appropriate eye contact, used nonjudgmental facial expressions, was attentive to body language and facilitative gestures to communicate genuine interest and continue to build trust, and used minimal encouragers to demonstrate interest and encourage participant expansion of answers. I employed additional interviewing techniques such as paraphrasing and summarizing to clarify and distill what was said, maintain the focus of the interview, clarify complex issues, or move to a new topic (Barlow, 2012; Dyson & Genishi, 2005; Harrell & Bradley, 2009; Leech, 2002; Yin, 2017).

Tier 1 Focus Group. In July of 2019 I ran a focus group with NGESL developers about the intention and design of the Tool. Individuals represented a cross-disciplinary mix of stakeholders who played various roles during the development of the project, principally serving as members of the Planning Committee, but also as unit-writing coaches, and/or NGESL PD developers. The roles participants played in the field included: an elementary English as a Second Language (ESL) Teacher in an affluent, low-incidence rural school; an

English Learner Education (ELE) Curriculum Coach in a mid-incidence, relatively affluent suburban district; a high school ESL Teacher in a sheltered English immersion program in a high incidence, high needs urban district; a high school History/Social Studies Teacher in a sheltered English immersion program in high incidence, high needs urban district (Vanessa); a “Leader of Teaching and Learning” at a dual language school in a high incidence, high needs urban district; an ESL Director from a high incidence, high needs urban district offering both sheltered English Immersion and dual language programs; Consultant #1, regional (Marie has been an active, leading voice in the state for 20+ years in matters of ML policy, curriculum, instruction, and professional development. Marie was later selected for a semi-structured interview and 4 unstructured interviews); consultant #2, out of state (Alexandra, also has many years of experience in the field of EL education in Massachusetts. Although she now lives in a midwestern state, she continues to work in projects related to curriculum, instruction, professional development, and guidance for Massachusetts); and a technical assistance provider from a federally funded institution. The other participants came from six different districts representing a mix of low, mid, and high incidence EL populations; rural, suburban, and urban districts; various socio-economic strata; and regionally they represented the southeast, greater Boston, central, and northeast areas of the state.

Tier 1 Semi-Structured Interviews. Following the focus group, and informed by participant responses, I selected two key informants with which to have individual, semi-structured interviews in July of 2019. Vanessa, a social studies high school teacher and consultant, participated in the NGESL Planning Committee, contributed to the development of the Collaboration Tool and the writing of the NGESL Resource Guide, served as a unit-

writing coach, and was a main writer of two NGESL professional development courses. The other key informant, Marie, was selected because she was involved in every aspect of development of the NGESL Project and its Collaboration Tool. Additionally, I sent Marie and Vanessa a few follow-up questions to fill in missing information.

Tier 1 Unstructured Interviews. Beyond the semi-structured interviews and follow-up questions, I also held several follow-up discussions with Marie that served as unstructured interviews. Marie was selected for her deep expertise, involvement in all aspects of the NGESL, her interest, and availability. These follow-up discussions lasted approximately one hour each. Meetings took place on 09/26/2019, 10/23/2019, 10/29/2019, and 11/13/2019.

Tier 2 Focus Group. In July of 2019 I conducted a focus group with 10 education actors from across the state. The participants were chosen for several reasons: 1) they represented 5 regions of the state: Southeast, Greater Boston, Central, Western, and Northeast. They represented various roles within their respective school systems, including: EL teacher, chemistry teacher, SPED teacher, curriculum liaison, “EL facilitator,” consultant. At least one participant worked at each level of schooling: elementary, middle, high, or systemwide. There was also representation from urban and rural districts, as well as affluent and high-poverty districts. Finally, participants represented low, mid, and high-incidence districts.

Tier 3 Focus Group. In July of 2019 I ran a focus group with 8 participants from Bay. Participants included Moira, Bella, Olivia, Mabel, Perry, and three additional teachers. Kay is a fourth-grade teacher, Connie is an inclusion teacher, and Karen, a former teacher, just became the literacy coach. Four of the teachers had recently taken the Expeditions course.

Tier 3 Interviews. In 2019, I held several discussions with the Moira and Bella, at times individually and at times with both together. In September of 2019 I conducted a semi-structured interview with Moira. In August of 2019, I conducted a semi-structured interview with Bella, and had several follow-up communications, including two unstructured interviews on October 18, 2019 and November 7, 2019.

Tier 3 Document Reviews. In addition to the focus groups and interviews, I analyzed artifacts from the Bay School related to the Collaboration Tool and its processes: three NGESL model curriculum units written by the Bay teachers, two NGESL units piloted by the Bay teachers, two videos of Bay School ESL teachers teaching one lesson each from the NGESL Model Curriculum Units (MCUs) in their classrooms, professional development records from the Blackstone district, and other Blackstone curricular mapping records from before and after their adoption of the Tool. I reviewed the units and videos against the data and codes I had already processed up to that point from tiers 1, 2, and 3 of this study. I looked for divergence and convergence principally with how the units and videos confirmed what developers reported as the intention of the tool, and to see the relationship of the final product (the unit) to how teachers at Bay School reported making sense of and using the Tool. I also reviewed coaching records from when the units were being developed to see if they brought forth any additional insights. Finally, raw footage from the development of the videos contained teacher reflections on the Tool and NGESL unit development process.

Digital Recording, Transcription, Member Checks, and Dialogic Approach

Interviews and focus groups were digitally recorded via Zoom and transcribed using Temi software. Once I received the Temi transcript, I corrected any mistakes on relevant sections. Riessman (2008) cautions researchers to beware that they do not stand in a neutral

objective position when constructing transcripts. Instead, researchers are implicated in making representational choices at every step of the way, making the act of transcription something that is far from a simple technical task into one that is deeply interpretive and inseparable from theoretical assumptions about language, communication, and “the self” (p. 36). Therefore, I sent transcripts and analyses to participants for accuracy checks, and participants were invited to add information they found pertinent (Dyson & Genishi, 2005; MacQuarry, 2009; Yin, 2017). My intent was for a dialogical approach to open up the opportunity for collaboration (Bogdan & Biklen, 2007; Riessman, 2008) and co-construction with the participants to craft “the story.”

Coding

The revised transcripts were imported into Dedoose software, where I continued coding the data using initial working codes I had already begun developing as informed by the literature and from the Tier 1 document analysis process I had started. Along the same lines, prior theory served as a resource for interpretation at the same time that I allowed space for new themes and theoretical constructs to emerge. Through this process, relevant text was selected and the rest put aside in order to make the data manageable (Auerbach & Silverstein, 2003, p. 37).

Through multiple review layers, I engaged in a dually deductive and inductive process of interpretation to search for “general statements about relationships among categories of data” (C. Marshall & Rossman, 2010, p. 150). Dedoose data were exported into spreadsheets and then organized in different ways as I looked for relationships among the data. In examining the textual data, I focused on the content that participants’ narratives communicated, rather than on exactly how participants structured their language to get their

points across (Riessman, 2008). Descriptive codes were applied to data to honor participant's voices and encourage the emergence of themes (Saldaña, 2012). A combination of coding methods, such as relevancy, magnitude, and frequency, were used in subsequent cycles of coding to deepen context of the degree of agreement and importance to participants. "Orphan" codes (Auerbach & Silverstein, 2003) were also collected and noted for the decision of whether to include or discard them. Data were continuously explored from various angles and codes and adjusted with each new batch of data that came from the three tiers of the study, until they became sufficiently stable to become the final coding scheme. Data were regularly recorded, indexed, and reviewed (Saldaña, 2012).

At the conclusion of transcription, close examination, and coding, the data were condensed into themes (discussed in chapters 4 and 5) as implicit topics that organized groups of repeating ideas (Auerbach & Silverstein, 2003, p. 38). The classifying of ideas and statements into theory was theory-laden from the beginning, informed by both my literature review and years of work in the field. Thematic analysis was careful and methodical – I educated myself about global, federal, state, district, and school contexts, as well as about the participants' individual contexts. I cross-referenced this with the theoretical work and empirical studies that come to bear on the issues, moving back and forth between my data and the scholarship of others. Complications and divergences on themes were carefully pondered. Themes were further organized and related back to theoretical constructs from the literature (Auerbach & Silverstein, 2003, p. 39). The analysis was developed with a firm ground in the subjective experience reflected in the descriptions of repeating ideas and themes, and later developed into a more abstract and theoretical level (Auerbach & Silverstein, 2003, p. 67). Thus the findings bridge raw data, my research concerns, the

participant's subjective experience, and the literature (Auerbach & Silverstein, 2003, pp. 40–41).

Document Analysis

Document analysis added a range of comprehensive, contextualized, naturally occurring materials to supplement the study's other methods and approaches (Raptis, 2012). Document analysis has several strengths, for example: since they are not created as a result of the study, the data already exist and are unobtrusive to participants; can be reviewed repeatedly; contain specific names, references, dates, and details of an event or phenomenon; are broad, as they can cover a long span of time, many events, and many settings (Yin, 2017); and avoid the possibility of the researcher to overinfluence participants (Raptis, 2012). On the other hand, the researcher must beware of potential bias of a document's author (Yin, 2017), and must be cautious to ascertain the authenticity, credibility, and meaningfulness of each item (Raptis, 2012). As with other data, I paid special attention to what could possibly contradict or complicate emerging understandings of the case (Dyson & Genishi, 2005; M. McGinn, 2010; Yin, 2017).

Document analysis was a significant source of data for the study, and it was generally divided into 6 phases: 1) identification and collection of pertinent documents; 2) beginning to narrow the data; 3) deepening understanding; 4) initial coding; 5) emergence of coding trends and patterns; 6) Organization of codes into themes and development of connections to larger theoretical constructs from the literature.

It is not always possible to predict what data resources will be most helpful for a case study (M. McGinn, 2010), so I began my search through a broad lens to identify documents related to the Tool. This initial search included: policy statements, guidelines, reports, PD

plans and reports, memos, meeting minutes, school records, web pages, videos, work products, and memos.

For step 1 of tier 1 document analysis, for example, I did an initial broad read of all MADESE documents that addressed the Tool, making general comments and memos as I went along. For step 2, I began to narrow the data by selecting a trio of intrinsically linked documents that are central to a discussion of the intent of the Collaboration Tool: the Collaboration Tool itself, the Interactive Guide to the Collaboration Tool, and the NGESL Curriculum Resource Guide. Over time, each document of the trio was read multiple times in its entirety and again by section of interest. During step 2, I continued to highlight passages for possible future inclusion and to note memos. During step 3, I began to further deepen my understanding through repeated readings, close analysis, and memoing of a) the three central documents, and b) relevant additional ancillary documents. I cross checked the messages of the ancillary documents with the three central documents, and annotated external documents that were cited as having informed the development of the Tool, noting the way the source theory and research were used to legitimate the Tool. I reviewed and checked additional messaging and references to the Tool in other state documents and communications. I reviewed the NGESL videos (MADESE 2017) and NGESL MCUs (MADESE 2017) to look for consistency or divergence in messaging. Moreover, I went back to memos on the topic that I had written over the previous years, starting in 2014. In the fourth phase of analysis, I reviewed the relevant documents again, now searching for context-building excerpts and beginning to code relevant text into the emerging coding scheme. In the fifth phase of analysis, I continued to finesse codes and note emerging trends and patterns which were continually reviewed, rearranged, and synthesized until the final phases of this study. In the

final phase of document analysis, I iteratively combined codes into themes. Orphan or loose codes (Auerbach & Silverstein, 2003; Saldaña, 2012) were also noted to check for future convergence and divergence with new data as the study progressed. It wasn't until I had collected and analyzed a significant amount of data from all tiers that I began to connect codes and themes to larger theoretical constructs from the theory and research. Document analysis yielded significant themes, meaning units, and descriptions of the phenomenon.

Also helpful were records from PD courses that support use of the Tool: FacT (MADESE, 2016b), a five-day course with graduate credit option, and Expeditions (MADESE, 2019a), a two-day workshop. I applied a similar data analysis process to course materials and evaluations: Appendix F details which workshop sections I analyzed.

Secondary Data Analysis

I obtained permission from the MADESE to access data collected in early 2019 by two research groups for the MADESE. Research Group #1, The Northeast Comprehensive Center (NCC), is a federally funded technical assistance provider serving state-level educational agencies in Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, and Vermont. Data collected included a statewide survey, three focus groups in different districts across the state, and document analysis. Group 2 was comprised of graduate students at the Harvard Graduate School of Education's Education Policy & Management Program (Leathers et al., 2019). They completed a supervised study that investigated what successful implementation of the NGSEL Project looked like in three high schools across the state. Data were collected through observations, focus groups, and document reviews. These timely studies helped to provide data to triangulate my findings,

and to extend my reach into understanding how the Tool was used in various state locations and contexts.

NCC Report (2019). The “Next Generation English as a Second Language (NGESL) Project: Evaluation Report” (NCC, 2019) was designed to evaluate the extent to which the whole NGESL Project, in its first two years of implementation (2016-17), met eight comprehensive project objectives, described below for context. My analysis focuses only on report items that speak directly to the Collaboration Tool, and is discussed in Chapter 4.

1. Clarify what is expected of ESL educators and define the focus of ESL
2. Model evidence-based processes to build the capacity of educators to develop high-quality ESL MCUs
3. Model processes and a common language so that ESL units simultaneously deliver contextualized language and grade-level standards-based concepts and skills.
4. Operationalize WIDA standards in a curriculum design model process.
5. Increase professionalism of ESL teachers.
6. Increase collaboration between ESL and content teachers.
7. Increase the quality and rigor of ESL curriculum via the prioritization of contextualized language and the simultaneous development of language and content.
8. Promote sharing of information about the NGESL project by project participants.

The NCC report included a mixture of qualitative and quantitative data: a survey, focus groups, and document reviews. Data collection instruments were designed during the

late fall of 2018 and data were collected and analyzed in the early months of 2019. The NCC report collected demographic information along with respondents' perceptions and experiences with the overall NGESL project, NGESL professional development courses sponsored by the MADESE, the NGESL Curriculum Resource Guide, and the Collaboration Tool. Limitations of this data set include the short timeline to conduct a large-scale evaluation and its constraint to perceptual data. Moreover, in spite of the report's evaluative title, it lacks data to ascertain actual implementation of the NGESL MCU design process, student growth data, and changes in instructional practices or teacher collaborative practices. Nevertheless, raw data and findings associated with this report contributed insights to my own research. As with all other data sets in this study, careful records were kept in the database for transparency and audit purposes.

NCC Survey (2019). The NCC survey added secondary quantitative data to my study, as well as additional qualitative data from open responses. The survey included 50 items distributed to 731 education actors across the state, resulting in 222 responses, at approximately a 30% response rate. The MADESE provided lists of relevant contacts from across the state, and the survey was sent via email and administered via Survey Monkey in late spring of 2019. Respondents came from 122 districts varying in size and geographical location. Out of 222 respondents, 46% identified as ESL teachers (n=102). Only one respondent was a content teacher. 43% were English Learner Education (ELE) directors or instructional coaches (n=96). In terms of educational experience, the largest group (25%) had between 6-10 years of experience (n=56), followed by 0-5 years (25%, n=55), 11-15 years (23%, n=51), 16-20 years (12%, n=27), 20-24 years (8%, n=18), and the smallest group (7%) had 25 plus years of experience (n=15). 83% of survey respondents (n=137) reported

having used the Collaboration Tool. Therefore, my analysis excluded 17% of respondents (n=29) who reported never having used the Tool.

The survey consisted of both open and close-ended items. Open-ended questions allowed respondents the option to provide narratives about different sections of the NGESL Project, including the Tool. Closed items were presented on a 5-point Likert-scale: Strongly Disagree (1), Disagree (2), Neither Agree Not Disagree (3), Agree (4), Strongly Agree (5). Survey questions were subdivided and tailored to particular educational roles: EL teachers, core content teachers, and EL directors/instructional coaches. Some questions were worded in terms of self-perception and framed through with “I” statements – in other words, what are your perceptions about your own experiences with the Tool? Other questions were asked in terms of perceptions of others. The latter, “non-I” type of question presents a limitation and serious validity concern. In one possible scenario, some directors who a) may not have had an introduction to the NGESL Project and its Tool and/or b) may not have been exposed to any of its PD likely answered “blindly” on how they perceive the Tool’s impact on the practice of their staff.

I approached the survey analysis thus: I first skimmed over the various data sets. After thorough and multiple passes, I identified relevant sections and responses. I created different versions of data files and organizational schemes to look for patterns and insights. I imported survey text files into Dedoose and applied emerging codes even as I continued to finesse and adjust them through each tier of my study. I continued an iterative review process to analyze closed and open responses as well as my own interpretations, and to begin linking the emerging codes, themes, and trends into incipient theoretical constructs.

NCC Focus Groups (2019). The NCC also shared data from three focus groups with a total of 14 participants across three districts. 13 participants were teachers from a range of grade-levels and years of experience, and one was an EL director. Focus groups lasted 45 minutes and included seven primary questions to prompt participants to share their perceptions and experiences with the overall NGESL Project as well as with its individual components, including the Collaboration Tool. I engaged in the same iterative process to select passages that were relevant to my study and to code them based on emerging themes and trends using Dedoose software, all the while inquiring, interpreting, analyzing, and aligning passages to my research questions, themes, and theoretical constructs from the literature.

Leathers et al. (2019) Interviews, Observations, and Report. The goal of this study was to answer the question: what does successful implementation of the NGESL Curriculum Project look like in the high school classroom? Over three weeks, Leathers et al. visited three high schools to collect data through interviews (13 ESL teachers and three administrators) and eight classroom observations. Interviews lasted between 15 and 25 minutes. Classroom observations lasted between 15 and 40 minutes. Limitations included limited time to collect data and too small a sample to be representative of the entire state. Internal validity of the data gathered from classroom observations was also threatened since observations were short and susceptible to the Hawthorne Effect, which suggests that teachers and students can change their usual behavior because of the presence of researchers (Centers for Disease Control and Prevention, 2008).

Primary Survey Questionnaires

Survey questionnaires allowed me to gather data through self-written reports from users of the Collaboration Tool across the state. They removed interviewer bias, permitted anonymity, allowed respondents as much time as needed to answer questions, and provided greater uniformity across answers because each respondent answered the same exact question (Chasteauneuf, 2012). This worked as a nice complement to the interviews and focus groups, which were more flexible and allowed for different kinds of respondent expression. A limitation to this method is the assumption that respondents have experience with and understanding of the Collaboration Tool, and the ability to articulate such understandings (Chasteauneuf, 2012). The survey protocols can be found on Appendices O-P.

Questionnaire 1: Pre-Interview/Focus Group Questionnaire. For all focus groups and interviews in all tiers of the study, I asked participants to fill out a pre-session questionnaire to collect demographic information with ten straightforward standardized questions (Chasteauneuf, 2012). Administering this via Google Forms allowed me to collect data in an efficient and organized manner, including: participant roles, number of years in the current placement, previous teaching and administrative experience, licenses held, any associated grade-levels and subjects, geographical area of the state, incidence of EL population in the district, how each participant got involved with the NGESL, and in which aspects of the project they participated. A total of 27 individuals participated in focus groups and interviews for this study, and 24 completed the questionnaire: 37.5 % identified as ESL teachers, 3% social studies, 3% ELA; 2% math, 2% science; 4% as administrators; 5% as coaches; and two identified as technical assistance providers, consultants, or facilitators. Out of the teachers, 58% were at the elementary level, 13% at middle school, and 25% high

school. Most came from high incidence districts (60%), followed by mid-incidence (27%) and low incidence (14%). Participants represented all areas of the state: Greater Boston (44%), Central (30%), Southern (13%), as well as small percentage from the Cape and Islands and the Western part of the state. The low rates of participation from the Western and the Cape and Islands areas of the state reflect general participation rates for other statewide projects. One participant reported their working geographical area as “nationwide.” Licenses participants held included: Massachusetts Sheltered English Immersion (SEI) endorsement (91%), ESL (87%), core content area (30%), and administrative (35%). At least one participant also reported the categories: “general ed,” elementary 1-6, special education, and K-12. Participants represented a balanced range of years in their current schools: 33% have been at their school for 5-10 years, 25% for 0-5 years, 25% over 15 years, and 17% for 10-15 years. Individuals also represented a range of participation roles with the NGESL Project. Most notably, 36% were members of the Planning Committee, 14% were part of the NGESL MCU unit writing teams, 23% were part of the NGESL MCU unit piloting teams, 54% completed the FacT training, and 41% completed the Expeditions training.

Questionnaire 2: Survey Questionnaire with Users from across the State.

Conducting my own open-ended survey questionnaire allowed me to build greater focus on my own research concerns beyond what the secondary data from the NCC (2019), PD records, and Leathers et al. (2019) were able to provide. The survey contained seven open-ended questions administered through Google Forms. I announced the questionnaire during the MATSOL 2018 Conference and on my Facebook page, “Pedagogy, Curriculum, and

Policy for Multilingual Learners.” 54 users of the Tool from across the state completed the questionnaire in July 2019.

A Research Journal: Memos and Field Notes

As several scholars have recommend (Dyson & Genishi, 2005; Glaser & Strauss, 1967; Yin, 2017), I kept a detailed journal throughout the research process consisting of memos and field notes to record the research journey. Notes were of factual, analytical, and reflective nature; included preliminary thoughts, general impressions, reactions, insights; as well as any observational, methodological, and theoretical issues that arose during the research process (Dyson & Genishi, 2005). In this way, I recorded my decision-making process, and “turn[ed] lived experience into bit[s] of written text” (Emerson et al., 1995, p. vii).

Memos are a mechanism that help maintain a high level of reflexivity and can also help to avoid “context stripping” (Maxwell, 2013). Memos can support the building of repeating ideas and themes, the selection of relevant text, and coding (Auerbach & Silverstein, 2003). Regular memo-ing (along with continuous return to data sources) became another data source (Dyson & Genishi, 2005), helped to build the study’s credibility, and the maintenance of participant voices in the forefront (Saldaña, 2012).

Database

All collected data were organized in a database and complemented by a research journal to provide clear audit trail (Dyson & Genishi, 2005; Glaser & Strauss, 1967; Merriam, 1985; Raptis, 2012; Yin, 2017). A database is a primary method for organizing case study data and analyses. It is a useful analytical tool that strengthens reliability of research, as it establishes an audit trail and leaves the opportunity for a critical reader to

examine the raw data that led to the conclusions (Davis, 2012; Dyson & Genishi, 2005; Yin, 2017). The database includes case notes, communications, documents, draft narratives with citations, and other relevant data. The database connects the final report's interpretations, claims, and citations to data that is organized and comprehensible for external audit (E. G. Guba, 1981; C. Street & Ward, 2012; Yin, 2017).

Researcher Positionality

Weis and Fine (2000) have noted that in positivist approaches, there is a “tendency to view the self of the social science observer as a potential contaminant, something to be separated out, neutralized, minimized, and controlled” (p. 34). Along with Weis and Fine, Dyson and Genishi (2005), and Yin (2017), I argue that in the general ethos of qualitative research, the researching self is an essential part of the case. In case studies, neither the people who interest us nor researchers' ways of interacting are easily standardized (Dyson & Genishi, 2005).

Since the researcher herself (I) is an important tool that is an integral part of the case study process, my data included notes in my various research hats – as a friendly newcomer to a school, as scout, as documenter, as an observer, as transcriber, as interpreter, as listener, as interviewer, etc. In the complicated, humanistic process of getting to know something very well (the case), the researcher is the primary instrument who must rely on the interest, responsiveness, and acceptance of those who already are an integral part of that world (Dyson & Genishi, 2005, p. 58). Through this process, I recognize that I am not a neutral tabula rasa. My lenses are colored through my overlapping identities (some of which are described in the preface to this dissertation), my experiences and being-ness in this world (including class, gender, race, nationality, ability, location, languages, politics, ideologies,

etc.), as well as through preferences and theories that positioned me as a distinctive subject conducting this research. Like Patel (2015), Dyson and Genishi (2005), and Yin (2017), I recognize that my subjectivity influences what interests me as a researcher, the kinds of questions I ask, the kinds of collaborators and participants I seek out, as well as the ways I collect, analyze, interpret, and report data. All this inevitable subjectivity was carefully positioned, and I judiciously reflected on each lens being used at each moment, maintaining distance as necessary, tending to the kinds of relationships that were ethical and productive for the work, and endeavoring to continually strike optimum balance between distance and intimacy with participants.

Data Analysis

A case study does more than merely describe data. It is also a logical approach that depends on analysis and interpretation (Aaltio & Heilmann, 2012). The aim of analysis is to synthesize the data to look for patterns that describe and explain the phenomenon “from within,” and this was achieved through systematic dissection, reduction, rearrangement, and interpretation the data (Auerbach & Silverstein, 2003; Dyson & Genishi, 2005; Evers & Staa, 2010; Paterson, 2010; Yin, 2017). Stemming from the qualitative tradition, scholars stress the importance of continuous analysis, or engaging in data analysis while it is being collected to refine questions, develop hypotheses, and select data to pursue in greater depth (Dyson & Genishi, 2005; Evers & Staa, 2010; Glaser & Strauss, 1967; Owens, 1982; Riessman, 2008; Rist, 1982; Yin, 1981, 2017). In this way, data analysis began with data collection, and ceased once additional sources did not bring any significant new data (Aaltio & Heilmann, 2012; Auerbach & Silverstein, 2003), when there were rich answers to the research

questions, and when I had relative confidence that the findings could be organized into a sensible narrative (Marshall & Rossman, 2010; Tobin, 2012).

A cornerstone of qualitative study is the understanding of participants' experiences about a particular phenomenon and their rendering through rich, thick descriptions (Dyson & Genishi, 2005; Merriam, 2009; Yin, 2017). In my study I named multiple data sources (semi-structured and unstructured interviews, focus groups, surveys, questionnaires, analysis of various sorts of documents, video analyses, secondary data analysis, and a research journal containing memos and notes), providing breadth and depth to support a thick/rich description of the phenomenon. Case studies are well known for generating daunting amounts of data, making data-reduction strategies necessary for the researcher to focus on what is most salient to the research question as well as to theoretical and conceptual frameworks, and to allow for organization of the data so that conclusions can be drawn (Auerbach & Silverstein, 2003; Dyson & Genishi, 2005; Paterson, 2010; Yin, 2017). The process of data reduction and analysis proceeded in an iterative, spiraling, cyclical process moving from general to more specific observations (Evers & Staa, 2010).

I approached analysis neither solely as a "bookkeeper" (primarily concerned with procedural aspects) nor as an "alchemist" (primarily concerned with creative aspects), but as an "artist" blending the transparency and rigor of the bookkeeper with the creative thinking of the alchemist (H. Marshall, 2000). Combining skill with art in a reflexive practice, the goal of my process was to be both geared by data and driven by theory, and to be systematic and extensive while avoiding rigidity (Coffey & Atkinson, 1996). This allowed me to build inductively in exploring the data with an open mind and deductively from theoretical notions (Evers & Staa, 2010). Informed by a phenomenological approach, Schram (2003)

underscores the need for qualitative researchers to acknowledge both inductive and deductive approaches to their research, with deductive analysis working to help with “verification and clarification” of what is discovered through inductive analysis (p. 21) (see also Fereday & Muir-Cochrane, 2006). The combination of various analytic techniques allowed me to develop a “thick analysis” to at least partially overcome biases from a single methodology (N. K. Denzin, 2009a; Evers & Staa, 2010).

My coding and analysis processes drew primarily from Auerbach and Silverstein’s (2003) method, although I was informed by several other complementary qualitative methods (Bogdan & Biklen, 2007; Dyson & Genishi, 2005; Glaser & Strauss, 1967; Riessman, 2008). Coding and analysis required several iterative and overlapping steps, and I organized them through Auerbach and Silverstein’s (2003) three stages: 1) Making the text Manageable: With my research questions and concerns in mind, I began by becoming thoroughly familiar with the raw data. I then began the process of data reduction by identifying “relevant text.” 2) Hearing What Was Said: I grouped together related passages of relevant text, thereby identifying themes and categories. 3) Developing Theory: I grouped themes into more abstract concepts (theoretical constructs) consistent with the literature and my theoretical and conceptual frameworks, thereby enhancing existing theoretical constructs.

To develop the case study narrative (Riessman, 2008), while acknowledging a sociocultural co-construction of knowledge and meaning, I blended aspects from feminist interactive methodologies (MacQuarry, 2009; Riessman, 2008), content analysis (Stan, 2009), explanation building (Belk, 2012) and thematic analysis (Ewick & Silbey, 2003; Lapadat, 2009; Mishler, 1991; Riessman, 2008). An essential foundation to keep in mind for case data interpretation is its contextuality, so data were interpreted with the object of

understanding the case of the NGESL and its Collaboration Tool through its social and cultural environments (Aaltio & Heilmann, 2012; Paterson, 2010). When engaging in thematic analysis, I focused more on the thematic meanings and “point” of what participants said than in the form in which it was said (Ewick & Silbey, 2003; Mishler, 1991).

Case Study Trustworthiness: Validity, Reliability, and Generalizability

The legitimacy of claims about validity, reliability, and generalizability rely on particular ontological assumptions (Auerbach & Silverstein, 2003; Moriceau, 2012; Riessman, 2008). Since I am more firmly planted in a phenomenologically-informed position that is troubled by poststructural disruptions, when examining the case study canon’s criteria for determining a study’s quality and trustworthiness, I tend to fall closer to Guba and Lincoln (Guba & Lincoln, 2011; 1979), rather than to the more positivist Yin (2017).

Validity

Given different types of data, myriad approaches to analysis, and multiple conceptions of data validity, there is no easy way to assess validity in case studies, as conceptions of such a construct are deeply rooted in ontological and philosophical traditions (Riessman, 2008; Yue, 2009). The notion of validity can be particularly polemic for those seeking multivocal representations and not adhering to a positivist worldview. For example, Auerbach and Silverstein (2003) and Riessman (2008) remind researchers that any interpretation of data is only *one* of many possible “correct ways” of interpretation. For them, if interpretation is supported by the data, it is valid, even if there are other ways the data could be interpreted.

Riessman (2008) proposes that all narratives, including those analyzing data for research, are deeply steeped in various contexts, and are inevitably particular constructs co-created through various particular frames, including political ones. Narratives are not simple factual reports of events, but are always partial, incomplete, and told from a particular point of view. In case studies, such as this one, verifying facts was less important than understanding how individuals and groups made sense and constructed meanings around the phenomenon. This, however, did not automatically exclude questions of case study quality. Careful examination of the study's strengths and weaknesses were still in order, as was the importance of accounting for issues such as trustworthiness, quality control, and legitimacy (Riessman, 2008; Yue, 2009).

To conduct a study of high quality, I committed to thorough preparation, ethical behavior, and knowledge-building related to the seven essential understandings of case study research methods: a) definition, b) purpose, c) data sources, d) field work, e) researcher role, f) analyses, and g) writing structures (Tobin, 2012). In the process, I also highlighted: a) the critical value of fostering multiple perspectives, b) the need to proceed systematically while acknowledging and agreeing to adjust to circumstances when necessary, and justifying those changes (if any), and c) the importance of soliciting authentic feedback from participants and experts in the community and academic institutions (MacQuarry, 2009; Riessman, 2008; Tobin, 2012).

In order to ensure strong credibility for my study, I also employed Owen's (1982) six techniques that are "in harmony with the basic assumptions of naturalistic paradigms" (p. 14): 1) prolonged data-gathering; 2) triangulation of data (Yin, 2017) and analysis (N. K. Denzin, 1989; Evers & Staa, 2010); 3) member checks (Dyson & Genishi, 2005; MacQuarry,

2009; Yin, 2017); 4) collection of referential materials, such as the research journal and data database (Davis, 2012; Dyson & Genishi, 2005; Yin, 2017); 5) thick description (Dyson & Genishi, 2005; Merriam, 2009; Yin, 2017); and 6) peer consultation (Dyson & Genishi, 2005; MacQuarry, 2009; Yin, 2017).

Triangulation

Via the means of multiple measures and methods, triangulation aims to reduce bias and improve convergent validity (N. K. Denzin, 2009a; Yin, 2017). While I challenge positivistic aspects that underlie the concept of triangulation, I agree with Guba and Lincoln (1979) that it is still important to scrutinize the findings of the case from multiple angles, and therefore I use multiple data sources. I look to Denzin (2009a) in considering not only data but also analytical triangulation to enrich the knowledge produced and diminish potential weaknesses for the case (see also Evers & Staa, 2010; Priola, 2010).

Reliability

Whereas validity addresses the accuracy of results, reliability – also associated with positivism – aims to achieve reproducibility of results, and its importance depends on the researcher’s epistemological perspective (C. Street & Ward, 2012). Again, while troubling positivist assumptions, I still addressed issues of reliability in my study through three techniques: 1) triangulation within and across data sources to minimize threats due to lack of consistency among data points; 2) inter-rater reliability in the development and confirmation of instruments and results; and 3) an “audit trail” (Guba, 1981) established through documentation of my research process in the research journal, database, and final report so that an independent party can reproduce the research process (C. Street & Ward, 2012), while

also providing a “chain of evidence” (Yin, 2017) that makes transparent how conclusions are drawn from the data.

Generalizability

The case is one of many possible framings of the world, so rather than clinging to a realist ontological position, Guba and Lincoln (1979) place the onus on the reader to determine the generalizability of the case (as a microcosm of the general) onto new, also multi-faceted realities (Moriceau, 2012). In this way, the reader chooses whether to *transfer* the findings to new settings. Similarly, for Stake (1995), researchers engaging in case studies gain a subjective understanding by recognizing their experience in the world, and generalizability of a case is confirmed only when the reader recognizes the resemblance of experience of the case in a similar situation, and is able to put it into practice. On the other hand, Donmoyer (2009) points out that, in reading a case, the reader could be accessing experience that they would have otherwise never known, and this case-specific knowledge could also be used in new situations. Thus, generalizability is not proved but proposed in the possibility of usefulness for the reader (Moriceau, 2012). In a postmodern turn, Moriceau (2005) argues that repetition is not to be expected in different situations, but rather a mixture of sameness and difference, so that when problems are repeated, novel ways of addressing them are reinvented, and rather than creating identical knowledge, the case study exposes problematics, raises questions, and describes possibilities (Moriceau, 2012). Additionally, I recognize that I was not able to investigate all possible factors that could contribute to my case-study phenomenon. Nonetheless, it is possible to suggest that findings have significant implications for the field (Haneda et al., 2019).

In the next two chapters I present findings. Chapter 6 presents a discussion of overall themes, implications, limitations to the study, and a final reflection on process and positionality.

CHAPTER 4

FINDINGS AND ANALYSIS PART 1 – MIRRORS AND WINDOWS:¹⁵ INTENT OF THE NGESL COLLABORATION TOOL AND ITS USE BY EDUCATORS ACROSS THE STATE

Chapters 4 and 5 focus on findings. The different ways in which I write each of these chapters represent the duality (in reality, multiplicity) of ways I have had to navigate my own voice to steer the traditional spaces of education in order to continue to do work that feels student-centered, authentic, meaningful, and ethical, and to attempt to further democratize and legitimate a wider range of potential “informal” voices and discourses in the arena of policy-making. In navigating various audiences (e.g., high and mid-level state policymakers and petty-bureaucrats, district-level administrators, classroom-level practitioners, and community-based advocates), I chose to write Chapters 4 and 5 in different ways that would allow me to be heard as “legitimate” to positivist-minded, historically-traditional policymakers while validating grass-roots practitioner voices through a sociocultural theoretical frame. Thus, Chapter 4 largely focuses on the object of the Collaboration Tool and is framed in a modernist, linear, positivist manner, while Chapter 5 focuses on practitioners and gives freer rein to sociocultural theoretical considerations. To be clear, I am not implying that all policymakers operate from positivist paradigms, but U.S. federal and

¹⁵ Allusion to “Curriculum as Window and Mirror” (Style, 1996).

state institutional and regulatory landscapes continue to promote positivist and neo-liberal approaches to educational policy and practice.

This writing choice is part of a larger strategy that allows me to maneuver various environments and nuclei of power (including academia) that can be unstable and multiply sited, and can shift with changing political leadership at global, federal, state, and local levels. In this way, I refer back to my theoretical framework and my acknowledgement of the ways people (audiences) understand and create meaning through their habitus (Bourdieu, 1990), identity, culture, time, and place (Patel, 2015). While clear-sighted and centered on my own message, I work the paradigms and registers at my disposal to engage the different audiences and the way their preferred discourses tend to frame, problematize, and “resolve” aspects of the world. Thus, I am acting upon the meta-knowledge that different types of discourse are associated with different types of power (Fairclough, 2013) – including the way this study frames state-to-policy power and practitioner-to-direct-action-with-students power. The point is – if I hope to use my scholarship as praxis to have real effect on social change – I must be able to speak to (and be heard by) the privileged discourses of different communities with their particular representations of contexts in action. In choosing to write Chapters 4 and 5 – and other aspects of this study – in ways that include these various communities, I offer a multiply-sited analysis and negotiation of official and unofficial policymaking contexts to ultimately affect future development of ELD standards and its associated resources.

Chapter 4 draws on data gathered from multiple stakeholders through documents, surveys, focus groups, interviews, and videos to present findings from tiers 1 and 2 of the study focusing on designers’ intent for the Tool and how users from across the state actually

use the Tool in practice. I interweave my interpretation of the data, participants' own language, and my understanding of the literature to develop and discuss major themes emerging from the study. Chapter 5 then zeroes in on the findings about how educators within the ecosphere of one school make sense of the Tool.

The findings in Chapter 4 suggest that developers' intent for the Tool is largely reflected in participants' discussions of how they implement the Tool across the state. This makes sense, as the Tool was designed in conjunction with educators and as a response to educators' requests for help in operationalizing the WIDA ELD Standards within the realities and constraints of their classrooms. While honoring the sociocultural context of language use exemplified in the dynamic and generative nature of the 2012 Edition of the WIDA ELD Standards, the Tool appears to acknowledge the limited amount of time teachers have with their students, as well as the great variability in possible language development trajectories and language choices available to enact the meaning-making demanded in college-and-career-ready classrooms. Put simply, the world of language is wide and full of possibilities, and teachers have limited time and much to teach. Thus, from the perspective of developers and implementers, the Tool acknowledges the practical constraints and demands in which classroom teachers operate, and identifies cross-cutting high-leverage macro and micro language functions that help teachers strategically establish priorities for the organization of language development within academic units of study. This function of the Tool fills a need unmet by the 2012 Edition of the WIDA ELD Standards.

Furthermore, the findings of this study suggest that the Tool does this in a non-prescriptive manner, providing "a springboard for conversation" (NCC survey participant, raw all data file, 2019) and encouraging the collaboration of content and language teachers to

a) unpack the language demands from grade-level academic standards and b) think critically about the development of a new language in the context of both academic learning and students' lived realities. Thus, the Tool encourages language-driven planning for a responsive and dynamic curriculum that is contingent upon the knowledge teachers have of their students, as well as the deepening understanding of personal, social, cultural, linguistic, and academic contexts between the two (student and teacher), as well as with the larger learning community of the classroom.

In this chapter, I argue that the NGESL and its Tool largely succeed in filling the vacuum left by WIDA Standards: the Tool brings together multiple complex frameworks in one place (WIDA standards, necessary accompanying WIDA tools such as the Key Language Uses and Performance Definitions, content standards, and backward design curriculum process); makes language more visible to teachers; prompts teachers to plan for language development in ways that are dialogic and responsive to students' strengths, needs, and lived realities; and ultimately underscores the body of expertise needed for skillful teaching of MCMLs within the reality of classrooms. Importantly, by including "Thinking Spaces," the Tool attempts to bridge the reality of the constraints of standards-based, positivist approaches to education to the opening of spaces for dialogical engagement with students where sociocultural theory and critical pedagogy live. Thus, by incorporating teacher voices and various other collaborative relationships at every step of design, the Tool is responsive to (and mirrors) teachers' expressed needs, and opens a window to beckon educators and educational systems to consider more human-centered approaches for teaching and learning.

Tier 1 (RSQ1): How Is the Tool Designed to Promote Processes That Advance Language and Content Development for MCMLs?

The themes discussed under the first tier of the case study speak to how designers intended for the Tool to promote processes that advance language and content development for Multicultural and Multilingual Learners (MCMLs).

Tier 1 Theme 1: Backward Planning for Curriculum and Instruction: Operationalizing the WIDA English Language Development (ELD) Standards

The tool was created to help develop Focus Language Goals to drive the unit process. To help operationalize WIDA in classrooms in a meaningful way, to facilitate the process for collaboration between language and content educators so they could think critically about language development. (NGESL developers, focus group, 2020)

In response to the difficulties posed by the operationalization of the WIDA standards, in 2015 DESE launched the field-based Next Generation English as a Second Language (NGESL) Project and, along with its partners, developed the Collaboration Tool. Representatives from various districts reported that many of the Commonwealth’s educators felt that the WIDA framework was not streamlined enough to provide concrete, user-friendly ways to develop curriculum using a standards-based backward planning model. Creating clear, language-focused unit goals based on WIDA Standards was a major challenge: “It was precisely this challenge of using the WIDA framework for curriculum planning in Massachusetts public schools, a challenge faced by the larger field of English as a Second Language (ESL) educators across the state, that led to this project” (MADESE, 2016d, p. 9). Two key questions driving the project included: how and where does the WIDA framework merge with a backward planning process of curriculum design, and how can educators create

clear learning goals for curriculum design? Thus, the Planning Committee decided to create a high-leverage tool that would give educators a way to more concretely work with WIDA Standards to develop curricular units (MADESE, 2016d, p. 46).

Understanding by Design (UbD) promotes “backward” curriculum development, beginning with clear learning goals and specific results in mind (Wiggins & McTighe, 2005, p. 56). A primary intention of the Tool is to provide a mechanism for prioritizing and establishing Focus Language Goals (FLGs) to populate Stage 1 of UbD curricular design. FLGs represent Wiggins and McTighe’s “desired results” that establish priorities for instruction and assessment. They become unit-level goals in Stage 1 of UbD, which then guides the nature of assessment and evidence of learning chosen for Stage 2, and the types of instruction and learning experiences planned in Stage 3.

FLGs encourage educators and curriculum writers to collaboratively and strategically prioritize what language to teach through an unpacking of the language demands from grade-level standards using WIDA’s four Key Uses of Academic Language. Among other uses, designers intended for the FLGs to help educators plan a balanced language curriculum that privileges high-leverage academic language to support students as they learn and use the types of language they encounter across general education classrooms. The Tool is intended to be a practical, used-friendly interface for teachers given multiple, complex, interacting systems.

The back of the Tool, titled “Thinking Space 2: Language as Action and Contingent Feedback,” prompts teachers to begin considering the FLGs in terms of current student performance. By identifying what students can do, using evidence from current student work, teachers can begin to envision “teacher moves” and “student moves,” to best support the next

steps in development toward the unit's FLGs in terms of academic and language development. This data-analysis and assessment is intended to help teachers determine possible entry points for the new unit. Thinking Space 2 also prompts planning for student self-assessment and emphasizes the importance of metacognitive and metalinguistic aspects of learning. According to developers, this pre-planning encourages educators to engage in a design process for responsive and dynamic curriculum that encourages a shared ownership of the learning process, and students are thus poised as partners in the learning process (Marie, interview, 2020; Vanessa, interview, 2020).

Tier 1 Theme 2: Collaborative Practice for the Simultaneous Development of Content and Language

Educators working in isolation cannot meet all of the challenges involved with giving MCMLs the high-quality curricula they are entitled to and deserve. (MADESE, 2016d, p. 14)

Documents and developers state that the Tool aims to support increased co-planning and co-teaching of language and content teachers (MADESE, 2016d; Marie, interview, 2020; Vanessa, interview, 2020). They describe it as “a multi-layered, multi-purpose tool,” whose name reflects the inherent necessity and expectation for collaborative planning to support MCMLs’ needs across language and content classrooms. The Tool brings together various multifaceted systems with the intent to support educators as they provide instruction that cultivates higher-order thinking skills while also developing ML’s language.

Developers believe that by coordinating and collaborating when planning ESL and content curricula, educators can better support one another, share unique fields of expertise, and take collective responsibility for ML achievement (MADESE, 2016d; NGESL

developers, focus group, 2020). These claims are also supported by WIDA’s Essential Actions #14 (“coordinate and collaborate in planning for language and content teaching and learning”) and #15 (“Share responsibility so that all teachers are language teachers and support one another within communities of practice”) (Gottlieb, 2013, p. 11).

As an embodiment of its philosophy, from its very inception, the Tool itself was designed through an intentional collaborative process. The district-based advisory Planning Committee was composed of a cross-disciplinary mix of stakeholders, including ESL and content teachers and administrators, state education collaboratives, language consultants, and representatives from higher education and the special education field. Within the Massachusetts Department of Elementary and Secondary Education (MADESE), three offices were involved: Language Acquisition; Literacy and Humanities; and Science, Technology/ Engineering, and Mathematics. Once the Tool and Resource Guide were designed, the project also included teams of educators from across the state charged with writing, piloting, revising, and filming the Model Curriculum Units (MCUs). The project ultimately incorporated educator input and feedback from over 30 districts serving over 65 percent of MCMLs in the state representing a range of high-, mid-, and low-incidence EL populations from various regions. This wide range of participation was intended to show the project’s embodiment of a long-term vision for strengthening relationships and supporting collaborative practices on behalf of ML learning at all levels: classroom, school, district, and state (MADESE 2016d, pp. 1–2; Marie, interview, 2020).

A crucial part of the development of the Tool included the understanding that several educators are often responsible for different instructional components in programs serving ML’s linguistic and academic needs, yet they are collectively responsible for the success and

outcomes of the whole program. Therefore, developers believe that collaboration and co-planning should be dedicated, systematic, and supported in schools. Thus, the NGESL curricular design process begins with a collaborative conversation and sharing of expertise, guided by the Tool. All NGESL unit-writing teams included a mixture of language and content expertise (MADESE 2016d; Marie, interview, 2020; Vanessa, interview, 2020).

Principles in the NGESL’s theory of action related to Theme 2 include: collaborative and dialogic practice can facilitate the development of authentic, language-rich curriculum to increase ML’s simultaneous development of language and content; sharing of unique fields of expertise within curriculum planning leads to educator mutual support; and educators can increase ML’s higher order thinking skills and depth of knowledge when they address a range of contexts that integrate language and standards-based analytical practices within curriculum (MADESE, 2016d, pp. 11–12).

Marie,¹⁶ the experienced consultant who was involved in every aspect of development of the NGESL Project and its Collaboration Tool, expressed that the Tool (and its sample protocols in the Resource Guide) supports a cyclical conversation embodied in Thinking Spaces 1 and 2: “The tool is a thinking space which is assumed to be supporting a cycle of planning” as teachers “talk about student performance, student work, curriculum and what’s coming next, what the content expectations are.” It is this “initial act of co-planning and co-analyzing student performance” that drives the development of FLGs for unit design. Additionally, Thinking Space 2 suggests “ongoing” and “sustained” cycles of planning for formative assessment and co-analysis of student work (Marie, interview, 2020).

¹⁶ All names in this paper are pseudonyms used to protect participant anonymity.

Developers who have also become facilitators of the NGESL Professional Development (PD) note that they have seen educators from different areas of expertise use the Tool to collaborate to create common goals, unpack language expectations from academic contexts, co-examine student work, and design curricular maps, among other uses. They report that they have seen the Tool provide a structure, a process, and a common language for ESL teachers to support content teachers in making connections between content and language, and for ESL teachers to learn more about the language of content to strengthen the quality of teaching in ESL classrooms (NGESL developers, focus group, 2020). Because it focuses on integration, the Tool breaks down the notion that ESL teachers simply need to plan grammar lessons, or that content teachers do not teach language.

Tier 1 Theme 3: Identification of Strategic, High Leverage Language for the Simultaneous Development of Content and Language

Theme 3 presents information about how each section of the Tool guides educators to identify strategic, high leverage language functions from the context of the disciplines.

Key Academic Practices. The key academic practices of the Tool are derived from the Understanding Language Initiative’s representations of commonalities of the academic practices in ELA, science, and mathematics (Cheuk, 2012; 2013; 2014). Cheuk’s (2012; 2013; 2014) diagram (Appendix X) helps to make visible the links among language, analytical thinking, and content-area learning.

Macro Functions. In order for its mission to be realized, the Tool needed to include strategic, high-leverage language functions as drawn from disciplinary contexts. Identification of such language functions for the current context of CCR standards began with the Council of Chief State School Officers’ (CCSSO) publication of the Framework for

English Language Proficiency Development Standards (ELPD) corresponding to the Common Core State Standards (CCSS) and the Next Generation Science Standards (2012). In 2015, as the development of the Tool was underway in Massachusetts, WIDA worked with the Center for Applied Linguistics (CAL) and other experts in the field to complete a linguistic analysis of core content standards across various states. WIDA identified four macro language functions that occur most frequently across academic standards and named them “the Key Uses of Academic Language:” recount, explain, argue, and discuss (Castro & Westerlund, 2015; CAL, 2014; WIDA, 2015, 2016). According to WIDA, Key Uses typify ways in which students are expected to use language recurrently in and across academic and social contexts. The Key Uses represent *meta* or *macro* functions,¹⁷ often involving more than one single language function (L. Wright & Musser, 2015). They occur in every discipline and are essential for MCMLs to meaningfully access the content of college-and-career-ready standards (Castro, 2015). The Key Uses are represented in the green columns of the Tool, and particularly in the dark green column titled “macro functions.” Developers encourage educators to examine their curricular and instructional planning through the lens of the key academic practices and macro functions, as they can serve as an initial organizing principle for planning a series of connected and logically sequenced units of study.

Micro Functions. The Tool extends the Key Uses/macro functions into the light green “micro functions” column. The 14 micro functions are derived from an earlier phase of WIDA’s analysis of standards (Castro & Gottlieb, 2014). Whereas WIDA chose not to

¹⁷ “Language function” refers to how students use language to accomplish content-specific tasks, or the purpose for using language.

use the micro language functions,¹⁸ the field-based Massachusetts team felt that additional, non-prescriptive, linguistic guidance would be of great benefit to educators of MCMLs. The Planning Committee decided to further exemplify linguistic forms and features that could be associated with each micro function, and so tasked groups of educators to expand the 14 micro functions into sample progression paths through alignment and adaption of documents such as the ELPD Frameworks (Pimentel et al., 2012), the California ELD Standards (Lagunoff & Spycher, 2012), the ELPA21 ELD Standards (Shafer Willner, 2013), and the WIDA performance definitions and dimensions of academic language (WIDA, 2012b). Thus, through the micro functions sample progressions, the Tool includes a field-based approach for making components of academic language more explicit. Additionally, the hyperlinked micro function documents also include a definition of each micro function, associated sample tasks, words, sentence frames, and question stems.

The 14 micro function sample progressions are not meant to be a prescription but rather a support for teachers. They are evolving, non-exhaustive examples of how MCMLs use language in school and offer one way to envision what each micro function might look like at the next level of linguistic complexity. Because language development is fluid, and there is a great range in variability in how each student develops language (Shafer Willner, 2013), developers urge educators to avoid reinforcing static notions of students' abilities, and encourage them instead to use continuous formative assessment practices, contingent pedagogy, and a nuanced approach to scaffolding to identify and flexibly respond to students' strengths and needs (Heritage, Linqunti, & Walqui, 2013, 2015). After such

¹⁸ The NGESL Project defines micro language functions as building blocks of language that help to co-construct the macro functions (MADESE, 2017c)

caveats, developers believe the sample progressions can help educators unpack aspects of academic language to create clear but flexible instructional paths. They note that the sample progressions can support development of general or discipline-specific academic language goals and can be used by both language and content area teachers (NGESL developers, focus group; 2020; Vanessa, interview, 2020; statewide focus group; 2020).

Focus Language Goals (FLGs). As previously mentioned, one of the primary functions intended by designers of the Tool is for it to serve as a support to create unit-level goals for a process of backward curricular design. Developers note that the world of language is enormous, and that teachers have limited time with students in front of them (Vanessa, interview, 2020). Educators could never “cover” all aspects of disciplinary language, and so must make deliberate decisions to set priorities for explicit language development given the normal constraints of instructional time. According to the Interactive Guide to the Tool (MADESE, 2017, p. 1), FLGs help to set priorities for language-driven curriculum, instruction, and assessment that address both language and academic development, including the skills, knowledge, and practices embedded in the content standards. The main parts of an FLG are a key academic practice and a language function.

The Interactive Guide highlights the importance of developing FLGs “with students at the center” to “allow ample opportunities for deep learning through contextualized experiences” so they can “become increasingly aware and strategic in their use of language to negotiate meaning in various contexts” (MADESE, 2017, p. 2). In regard to Thinking Space 1, dedicated to the development of FLGs, developers highlight that the Tool is not a worksheet or a checklist, but a thoughtful decision-making process for instructional design (Marie, interview, 2020; Vanessa, interview, 2020).

Tier 1 Theme 4: Larger Pedagogical Grounding of NGESL Project

By capitalizing on the experiences, prior knowledge, languages, cultures, and backgrounds MCMLs bring to learning, and by using their linguistic and cultural profiles in curricular design, educators can instruct students more responsively, resulting in increased student agency, understanding of multiple perspectives, and stronger critical lenses with which students can evaluate and advocate important issues. (MADESE, 2016d, p. 11).

As discussed, the Tool is intended to be used as a central frame to organize and prioritize the linguistic and academic goals for standards-driven education in current K-12 settings. Developers see the Tool as embodying the project's philosophy, and state that the Tool does not exist within a vacuum, outside its processes and larger pedagogical grounding (NGESL developers, focus group, 2020; Marie, interview, 2020; Vanessa, interview, 2020). In other words, the Tool sits on a foundation of not only language and academic standards, but also on a critical sociocultural aspect reflected in the themes, processes, and theoretical framework that guided the project. Developers explain that from the beginning, the Planning Committee articulated a priority that the NGESL take an asset-based approach; foster culturally-sustaining teaching and learning; and attend explicitly to strengthening student agency and critical stance, incorporating student identities, backgrounds, prior knowledge, and experiences (MADESE, 2016d; NGESL developers, focus group, 2020; Marie, interview, 2020; Vanessa, interview, 2020). The Resource Guide explicitly states that "attending to such factors requires that all of these considerations be intentionally woven into curricular design and enacted through instructional practices in the classroom" (MADESE, 2016, p. 160). For example, the project's Planning Committee decided on a unifying theme

of social justice across the 12 MCUs developed in 2015 (MADESE, 2016, p. 153; Marie, interview, 2020). This points to the developers' intent for the Tool to be used within a critical framework, and their hope that the Tool will support and guide students in using higher-order thinking to question existing situations and perspectives, using knowledge and language as tools to make choices. The NGESL also points to a sociocultural grounding when acknowledging that language is built within each unique context, and a student-centered base when asserting that student background, experience, and prior knowledge should drive a contingent pedagogy reflected in the curricular design.

In terms of how it positions teachers to support students with the above areas, the developers and supporting documents point to the idea that the NGESL intended to “support educators as explorers, researchers, and intellectuals,” and cite this as one of the reasons for choosing to develop local educator capacity rather than hiring an external publishing company (MADESE 2016d). The Resource Guide elaborates:

The *process* of knowledge-making with our students in our classrooms, from the perspective of curricular design, does not necessarily need to reside outside of ourselves. In public education, and in *specific and local* contexts, no one is better positioned to know student strengths and areas of potential growth than the teacher in front of them, and we (as teachers) need to be comfortable with choice-making in curricular design processes. In figuring out the best that we can do for our students, we are ourselves engaged in productive struggles to solve problems of practice, and to continue developing our own knowledge about the most effective ways to educate our students. (MADESE, 2016d, p. 15)

It is important to note that developers of the NGESL and its Tool intentionally aligned the project to the Six Standards of Effective Pedagogy, “a program of professional development based on sociocultural perspectives on education” (Haneda et al. 2019, p. 166). Professional Development on the Six Standards of Effective Pedagogy was sponsored by the MADESE via coaching courses from 2014 to 2017 (Teemant & Tyra, 2014b, 2014c, 2014a). The Six Standards build on previous work on linguistically and culturally responsive pedagogy (Tharp & Gallimore, 1991) as well as on Tharp, Estrada, Dalton, and Yamauchi’s (2000) Five Standards. It added a sixth standard: student agency and critical stance. Building on a strong critical theoretical lens to guide the work, the NGESL built on Teemant’s (Teemant & Tyra, 2014b, 2014c, 2014a) foundation on the Six Standards and on the studies that show the validity of this approach (Doherty et al., 2002, 2003; P Estrada & Imhoff, 1999; Peggy Estrada, 2005; Hilberg et al., 2000; Teemant, 2014).

Tier 2 (RSQ2): How Do Education Actors from Different Settings Report Using the Tool to Promote Language and Content Development?

The themes discussed under tier 2 speak to how users from across the state report using the Tool. The most prominent themes for tier 2 are generally congruent with themes in tier 1 that emerged from designer’s intentions in speaking to how the Tool promotes processes that simultaneously advance language and content development for MCMLs.

Tier 2 Theme 1: Backward Planning for Curriculum and Instruction: Operationalizing the

WIDA ELD Standards

The NGESL Project and the Collaboration Tool changed how I think about and implement WIDA ELD standards. (Expedition PD Evaluation Records, 2019)

Overall, the Northeast Comprehensive Center's (NCC) survey and focus group results from education actors across the state indicate that all aspects of the NGESL project (the Tool, Resource Guide, and PD) generally contributed to educator perception of an increased understanding and focus on standards-based backward planning for curriculum and instruction and operationalizing WIDA standards. Appendix G details NCC survey questions focusing directly on the Tool and Theme 1.

The results from all data sources informing Tier 2 (NCC survey and focus groups, my statewide focus group and statewide questionnaire, and PD records) indicate that teachers generally agree or strongly agree that the Tool had a positive effect on increasing participant understanding of how to: develop goals for high-quality curricular units that address language and content development; improve implementation of the WIDA ELD standards, specifically as related to the simultaneous development of content and language; increase the rigor in ESL curriculum development by ensuring that language development is contextualized in grade level key academic practices and standards; and to develop a better understanding of the NGESL curricular process. Participants indicated that the Tool synthesized the work for them, made the curriculum development process easier, and helped them become better equipped to operationalize the WIDA standards. Participants in the NCC evaluation found the Tool to be user-friendly, and noted that while sometimes educators feel intimidated when they first look at the Tool, once they begin to understand how the Tool can be used, they begin to see its value (NCC, 2019, p. 40). The NCC findings for Theme 1 are congruent with the data I gathered from statewide and Bay users of the Tool.

The Tool scored highly in its perceived contribution to NCC project objective 3: "Model processes, and a common language so that ESL Units simultaneously deliver

contextualized language and grade-level standards-based concepts and skills” (m=4.09), project objective 4 “Operationalize WIDA standards in a model curriculum design process” (m=3.78), and project objective 7 “Increase the quality and rigor of ESL curriculum via the prioritization of contextualized language and the development of language and standards-based concepts and skills” (m=4.0). Respondents emphasized that embedding language instruction within content that included real-world application increased student engagement and the rigor of ESL curriculum. These findings are echoed in the other tiers of the study.

While NCC respondents generally perceived that the NGESL had a positive impact on operationalizing WIDA standards, in the open responses some expressed concerns about the WIDA standards themselves: “they are not standards and I do not find them useful” (NCC survey respondent, raw all data file, 2019, p. 88). One respondent indicated that the standards are too broad and vague to be helpful for curriculum development. One participant felt that the Tool did not add to their understanding, but simply validated what they already knew about WIDA. Still, the same participant felt that the Tool helped them become more deliberate about using the WIDA framework and about which language skills to teach. Another participant said, “We had a good understanding of the [WIDA] standards beforehand, but to be able to make the connections across the resources has allowed us to put what we knew into practice. That’s what was most valuable to us [about the Tool]” (NCC, 2019, p. 35).

Linking the operationalization of WIDA standards to curriculum development, one participant commented: “The Collaboration Tool has been extremely helpful for planning units because all the necessary information is contained in one place” (Northeast

Comprehensive Center, 2019, p. 35). Findings from other data sources echo this reflection. In the statewide focus group, statewide questionnaire, at the Bay School focus groups and interviews, most respondents reported that the Tool created a more integrated approach to operationalize WIDA and academic standards in a curriculum design process: it allows “further exploration and new ways to teach the WIDA ELD standards. [The Tool] uses these standards in a more specific and in-depth manner” (Collaboration Tool users from across the state, Statewide Focus Group, 2019). Respondents in “Expeditions” evaluations reported that the Tool breaks down ELD standard expectations, offers concrete ways to “actualize the ideals of language learning” and is “teacher and student friendly” (NGESL FacT PD participants, PD Records, 2019). In the statewide questionnaire (2019), two respondents reported they already possessed knowledge of the WIDA standards, and that the Tool simply validated their practice.

Participants from various sources across tiers 2 (statewide users) and 3 (Bay School) reported using the Tool for a range of activities related to planning curriculum, including: develop language-driven unit goals, write FLGs and daily language objectives with academic and language standards, plan “well-structured lessons,” help see gaps in previously existing lessons and units, encourage deeper thinking, guide teacher discussions for creating units, make instruction more targeted and specific, plan a year-long vision of curricular units, revise existing units and lessons, help understand where students currently are in their language development, and plan trajectories to get to the next level. Leathers et al. (2019) found that teachers believe the FLGs are a valuable support mechanism to design units and lessons with specific targets. Findings from tiers

2 and 3 reveal that the Tool has been used in planning for all core content areas and all schooling levels.

Tier 2 Theme 2: Collaborative Practice for the Simultaneous Development of Content and Language

The FLGS gives both teachers (language and content) shared goals and responsibility.

It was like getting a new pair of glasses. (Expeditions PD Participant, PD evaluation, 2019)

Overall, NCC survey results indicate that all aspects of the NGESL project, including the Tool, generally contributed to educator perception of feeling better prepared to collaborate with other teachers, and of having an increased interest in doing so. The NCC report (2019) further notes that participants generally found the Tool to be very user-friendly and that it makes unit planning and collaboration easier for both content and language specialists. Appendix H details survey questions that focused directly on the Tool in relation to Theme 2.

Primary and secondary qualitative self-perception data I collected and analyzed from additional sources generally echo the NCC findings. For example, participants of the NGESL PD noted that by engaging with the Tool and its processes, collaborating teachers “can both bring our knowledge (language and content) and use it to help create learning objectives for students at varying English Proficiency levels” (Expeditions PD Participant, PD evaluation, 2019). Fifty-four statewide participants from my survey also responded positively in their perception of how the Tool supports collaborative practice for the simultaneous development of content and language. No participant reported a negative perception of how the Tool supports collaborative practice. One respondent

noted: “I see this tool as a means of getting all parties together to best instruct MCMLs” (ELD director, statewide questionnaire, 2019). One respondent in the statewide questionnaire noted the following:

Our district (X) has fully embraced the Collaboration Tool and ESL MCUs. We have seen remarkable gains in our MCMLs' academic performance and a tremendous increase of understanding of the role of an EL teacher and how we can best foster continued collaboration between classroom/content teachers and EL teachers. At the district level, as an administrator, the tool has really facilitated deep discussion with the Principals about ESL MCU implementation and the impact it can have, and has had, on EL student learning. (ELD director, statewide questionnaire, 2019)

Tier 2 Theme 3: Identification of Strategic, High Leverage Language for the Simultaneous Development of Content and Language

Macro, micro functions and the Collaboration Tool have been a great support. (NCC survey respondent, 2019)

Respondents from all sources indicated that the macro and micro functions and their sample progressions can help educators envision with greater linguistic specificity how they can support and scaffold a student’s use of language as it increases in complexity: “When academic language is broken down like this, it's easier for teachers, content and ESL, to be more aware of the language patterns they've been using in their classes for years” (Expeditions PD participant, PD Evaluation, 2019). Participants noted that the functions “highlight connections between language and content that are often implicit” (Respondent for statewide questionnaire, 2019).

The Tool’s prioritization of strategic language helps educators make choices about “next steps” in curricular planning: “The Collaboration Tool has greatly impacted our curriculum development by emphasizing the focus on language through the key uses (macro and micro functions) and providing guidance on creating FLGs” (NCC survey respondent, raw all data file, 2019). One participant offered this: the Tool helps me “hone in on specific language functions to teach within each core content topic so students can access both the content and language of the lesson/topic being learned” (Expedition PD participant, PD evaluation, 2019). Some users further expand sample progressions by identifying more specific ways in which the micros are used within a particular disciplinary task or text. For many, the Tool is a reminder that micro functions should be targeted to develop proficiency. Another participant similarly added: “The micro-functions have allowed us to hone in on the academic language functions students really need to succeed in school” (NCC survey participant, raw all data file, p.197, 2019).

As used in conjunction with the WIDA Performance Definitions, the functions and progressions help educators calibrate language expectations at various ELP levels: “The micro function tools have been very helpful. They outline specific academic language that is applicable to units of study while simultaneously differentiating that language for all levels of English proficiency” (NCC survey participant, raw all data file, p.187, 2019).

One participant noted that the Tool: “is helping teachers to realize they are not responsible for a (silent) paper mache mummy project, but perhaps a written and verbal explanation of steps in a process in making a mummy, for example” (NCC survey participant, raw all data file, p.198, 2019). For these and the other reasons addressed in this study, teachers often report “loving” the micro function sample progressions.

Tier 2 Theme 4: Conditions and Barriers

During project development, NGESL developers documented necessary conditions for optimum implementation. For example, to provide an effective and coherent educational program for MCMLs, built-in structures for co-planning and collaboration between content and language teachers “is not a luxury but a priority, a necessary expectation of any comprehensive program serving ELs” (MADESE, 2016, p. 14). During the focus group, developers acknowledged that “in today’s constraints” there are many competing forces, and some districts may not have the time or money to put some of these necessary structures into place. Still, they contend that in order for teachers to collaborate effectively, “collaboration and co-planning time must be dedicated, systematic, and supported in schools” (MADESE, 2016, p. 14).

Marie, the consultant who was involved in developing all aspects of the NGESL and its Tool, noted that there is a top down systematizing of structures that needs to happen with administrator support to implement the collaborative NGESL model well. She noted that full implementation of any new initiative takes time and should be expected to go through various stages of development before being fully institutionalized, and shared research showing that districts often do not support initiatives beyond a basic initial stage of planning (Marie, interview, 2019). In addition to having administrative support, built-in PD opportunities, resources, and available time, developers also note that any initiative needs to be attractive to teachers, so that there is a “ground up” demand for use. Marie points to the example of one district where administrators heard about use of the Tool when their teachers were being filmed for one of the NGESL videos. In this case, it was only after teachers “tested” the NGESL and the Tool and found it to be useful that administrators supported it

(Marie, interview, 2019). Vanessa, the social studies teacher and consultant who is also a NGESL developer and facilitator of NGESL PD, added other instances of teachers “who have pushed from the ground up to create times and spaces” to collaborate using the Tool’s processes. Vanessa further noted that not having scheduled time to collaborate “is one of the bigger challenges, which is not really so much about the Tool itself, but about the systems in place” (Vanessa, interview, 2019).

Marie observed that since thorough initiative implementation of is often lacking in many districts, “this Tool builds on teachers talking to teachers, using their agency and expertise within and between their classrooms, and using their knowledge and evidence of students’ performance to move learning forward at the most direct level” (Marie, interview, 2019). Developers believe that teachers can use the Tool without the greater infrastructure, but note that the Tool can be implemented much more systematically and at a deeper level when schools have supports in place (NGESL developers, focus group, 2019).

When conditions for optimum use of the Tool were not present (administrative support, built-in collaboration time, access to PD, funding), statewide and Bay users framed them as barriers (Bay School educators, focus group, 2019; Moira, interview, 2019; Bella, interview, 2019). Moira, the Bay School ELE director, noted that she lacked funding to implement the NGESL across the district in the way she would like to. Vanessa’s words come back to mind here, as these seem to be external barriers to using the Tool, rather than barriers inherent to the Tool itself.

I asked statewide and Bay participants about what they thought did not work well about the Tool, what they thought were inherent barriers to it, and what they might like to see changed. Some participants thought the Tool had too much jargon, affecting their ability to

use it effectively (e.g., “contingent,” and “language as action”) (Bay School educators, focus group, 2019; Moira, interview, 2019). This was echoed in the Leathers et al. (2019) report: “many respondents described the Collaboration Tool and MCUs as being verbose and overwhelming, which affected their ability to use it effectively” (p. 16).

The most commonly cited barrier to using the Tool across sources was the initial reaction of being “overwhelmed” when looking at it for the first time (Statewide focus group, 2019; Bay School focus group, 2019). Participants in the Bay School and statewide focus groups (2019), as well as in the statewide survey (2019) noted that the Tool can look “daunting,” especially to teachers who are not language specialists. On the other hand, some statewide participants and Bay focus group participants counteracted: “But I do like it to be daunting because language and content acquisition itself is complex and this Tool sends the message that there is a lot of complexity behind learning language while you're learning content” (Statewide user, statewide focus group, 2019) and “I think the genius of the Tool is its complexity and the multiple layers. And I think the two pages of it is actually, I think works” (Statewide user, statewide focus group, 2019).

Another repeated sentiment is encapsulated here: [at the first glance] “I think you can shut down pretty quickly, but it is such a treasure trove really once you start to understand it... The design is really impressive” (Statewide user, statewide focus group, 2019). The statewide focus group discussed this topic in detail. One participant captured the feeling: “I just remember the horror that I that I had when I first looked at [the Tool]. But I can look at it now with no problems.... I don't find the problems anymore. They're just not there. And so I think maybe rather than the document, it may be those of us who take the document and take it back to our colleagues. Maybe we need to take that next step so you are all speaking the

same language prior to being shown that document” (Statewide user, statewide focus group, 2019). Another participant concurred, and related the experience in her context, a substantially separate school for students with special needs. She noted that when first introduced to the Tool, Special Education teachers found it daunting. But then, by “having teachers see for themselves” the “gap” related to language development in their existing curriculum, the special education teachers began to see the need for the Tool, and “they were kind of happy.” They started to “chop down” the sections of the Tool to better understand them, and by the end of the semester, “people were actually very open to utilizing it... [students who have] special needs especially can benefit from this tool and need it just as much... So this is really a remarkable tool for all educators” (Statewide user, statewide focus group, 2019).

Positive responses to the Tool, in spite of its first appearance, showed similar results: “While encyclopedic (can be overwhelming) the Collaboration Tool is a super helpful resource” (Statewide user, statewide questionnaire open response, 2019) A participant noted: “Although it is rather dense (and therefore intimidating at first glance), I believe that learning how to use the Tool in meaningful chunks through ongoing PD will generate positive results in terms of teachers actually using it. It is especially helpful in facilitating meaningful conversations between ESL and classroom teachers so that gen ed teachers can understand what their ESL colleagues know and do” (Statewide user, statewide questionnaire open response, 2019). Additional respondents continued to report that while the Tool contains a lot of information, once they “learn” the Tool, they believe all the information contained within is necessary, logical, paired down, and they would not change it (Statewide focus group, 2019; Bay School focus group, 2019; Moira, interview; 2019; Bella, interview, 2019). One

respondent had a more negative reaction: “They are very long and cumbersome; not as user friendly as I would like” (Statewide user, statewide questionnaire open response, 2019). One high school science teacher said: “I think [the Tool] is a great example of Occam's razor. I think you've shaved off everything that can be shaved off and designers of this have really gotten it right down to what is needed. I don't really see anything that's unneeded there” (Statewide user, statewide focus group, 2019). In summary, most participants believe the Tool is overwhelming at first glance, but also believe once one “learns” the Tool, the design works well.

In addition to removing jargon and pairing down the amount of information on the Tool, suggestions for changes collected from the Bay School and Statewide focus groups included: add more micro progression examples; differentiate progressions by content area; add more examples of sentence stems and grammatical features; make the Tool more applicable for younger grades; make sure that all links are in the same format; and consider the vertical and horizontal layout and coloring of the Tool. With regard to suggestions for changes to the layout, some participants from Bay insisted that they like the Tool as it is: “I just think that the tool does a great job distilling that complexity and really, you know, making it sort of portable in a lot of ways. Yet when you open it up, it just keeps expanding and expanding. There are so many different dimensions to it and, and in a lot of ways it really does level the playing field for all students. These are skills that all kids need and not just the ELs, even though it's just huge for them... So I think it's just really an impressive tool” (ESL teacher, Bay School focus group, 2019). This was further echoed by a user’s comment on the PD evaluations: “For me, the layout of the entire tool is beneficial. I especially like all the

embedded links! That is amazingly helpful!” (Expedition PD participant, PD evaluation, 2019).

Summary and Conclusion

In Chapter 4, I presented findings related to the designers’ intent for how the Tool would support educators of MCMLs. As a mirror of practice to policy/guidance, I discussed findings related to how educators from across the state actually use the Tool in their schools and classrooms. Respondents to the surveys and questionnaires, and participants in focus groups and interviews largely view the Tool positively.

Some key takeaways include that educators from across the state appear to find the Tool to fulfill a serious need in the WIDA ELD Standards: it offers a process from which to establish unit-level focus language goals for curricular design, and it better supports teachers in unpacking language from the academic context while making high-leverage aspects of “academic” language more visible, thus further helping teachers to embed language development throughout units and lessons in the realities of their classrooms. It is important that the Tool not only makes those technical aspects of the education of MCMLs more workable, but that the Tool’s design itself incorporated teacher voices via collaborative and democratic structures, thus supporting “educators as explorers, researchers, and intellectuals” (MADESE, 2016d, p. 20). This Tool, designed to fulfill a technical need in standards-based education in the era of school reform, insists on an acknowledgement that educational technical exercises are never neutral, but exist within pedagogies, ideologies, and power-laden structures. This notion will be revisited in more detail in Chapters 5 and 6. For the conclusion of Chapter 4, it suffices to say that the NGESL and its Collaboration Tool, undergirded by sociocultural theories and inspired by critical pedagogies, call for policy

processes that humanize educators-as-workers. Humanization of teachers-as-workers is another mirror image reflecting back to critical pedagogy's call for the humanization of students in our classrooms. It is only through the humanization of both educators and students that more authentic, dialogical relationships can flourish between teachers and students as they jointly increase their *conscientização* and continue to read the word and the world (Freire, 2000).

The more deeply reflective practices that are invited by the "Thinking Spaces" of the Tool are sketched out more clearly in the voices that appear in Chapter 5, where I take an in-depth look at how education actors within the ecosphere of one school experience the NGESL and put the Tool to practice.

CHAPTER 5

FINDINGS AND ANALYSIS PART 2 – A DEEP DIVE: EDUCATION ACTORS IN ONE SCHOOL MAKE MEANING OF THE NGESL COLLABORATION TOOL

Chapter 5 focuses on educator meaning-making and the practical processes educators use to facilitate the operationalization of ELD standards via the Collaboration Tool at the Bay School in the Blackstone District (pseudonyms). Framed through my theoretical and conceptual frameworks of radical democracy as the center of the public educational endeavor and policy as a social practice of power (Levinson et al., 2009), this chapter continues to examine the implementational spaces of educators as they reconstruct policy for their students.

The discussion is organized as follows: 1) contextualization of Chapter 5 into my theoretical and conceptual frameworks, highlighting the move away from a positivist view of policy to a more discursive one of policy-as-practice; 2) an examination of how Bay educators used the Tool in *materials* they created for curriculum and instruction; and 3) *processes* and *experiences* with the Tool at Bay; and 4) summary and conclusion.

A Sociocultural View of Policy-as-Practice

Situated in a complex web of social relationships, as well as in their own identities, histories, cultures, places, and time, educator sense-making of policy is intertwined with their experiences in the physical and social worlds (Valdiviezo, 2010, p. 256). As educators transform ELD standards policy into practice, they engage in creative readings and writings

of the word and the world. Thus, educators are cultural/material/historical actors negotiating and co-constructing policy as a social practice of power (Levinson et al., 2009).

My theoretical framework follows Dewey (1897) in positing that any progressive work in education must “theorize conditions for a particular form of democratic life.” To this, I added sociocultural and poststructural understandings of meaning-making that must be grounded in ethical choice (Harcourt, 2007). Thus, it is my hope that this study’s unpacking of complex and interdependent practices around the implementation of ELD standards can contribute to the evolution of the technocratic landscape of most education policy which generally preclude a more democratic and participatory approach (Levinson et al., 2009).

Findings from the Bay School are generally congruent with themes that emerged in Chapter 4 from the perspectives of designers and statewide users of the Tool (tiers 1 and 2 of the study). Like others, Bay participants also believe that the Tool simplifies and enriches the process for using WIDA and academic standards in backward-designed curriculum for MCMLs, that it makes language more visible to teachers, helps teachers feel better prepared to collaborate with their language or content counterparts, and that teacher voices are valued in this process. In other words, as a technical exercise in facilitating the application of standards to curriculum for MCMLs, the Tool appears to work. I argue that these technical exercises are important in their potential to increase the quality of instruction in language and content classes, supporting teachers to attend to language in functional ways, while continuing to develop aspects of conceptual and cognitive learning. Thus they offer valuable lessons to future standards designers and to policy-making processes. Still, the most interesting finding of this chapter (representing tier 3 of the study) lies in educators’ sense-making around the Tool’s “Thinking Spaces” and its prompting of collaborative reflective

practices – a finding that invites future inquiry into if and how critical practices can exist in traditional structures of public schooling.

Tier 3 (RSQ3): How Do Education Actors in one School Report Making Meaning of and Using the Tool and Its Processes?

Tier 3 Theme 1: Bay School Materials Developed from the Collaboration Tool

I reviewed several *products* developed from the Tool at Bay School and discussed them at length with participants both in the exploratory and formal phases of this study. Discussion included processes and rationales. In the formal phase of the study, I paid particular attention to 4 NGESL units (MADESE, 2017) in use at the Bay School: “Emotions / How do I Feel?” for Kindergarten, “Animals and Where They Live” for the grade band 1-2, and “Working Together” and “Historical Perspectives” for the grade band 3-5.

“Animals” included Bay teachers Olivia, Perry, and Mabel¹⁹ as writers, and “Working Together” was written by Olivia and another Bay teacher with whom I did not have the opportunity to speak. Each unit-writing team included both language and content expertise. At the time of writing, the Bay team received Professional Development and coaching from NGESL developers. Although Bay teachers did not write “Emotions” and “Perspectives,” they taught these NGESL units and filmed some lessons. Raw video contains teacher reflections, and the final video is annotated to highlight key lesson features. The two recorded lessons I analyzed came from

¹⁹ All names in this paper are pseudonyms used to protect participant anonymity.

“Emotions” taught by Olivia in Kindergarten, and “Historical Perspectives” taught by Perry in third-grade, both in 2017.

Notes on the units state that their goal is to deliver systematic, explicit, and sustained ELD in the context of academic standards. Alignment to grade-level content standards expectations and implementation of the WIDA Standards Framework as aided by the Tool is visible in various ways. For example, the introduction to “Animals” states that its purpose is to “help ELs develop the language necessary for academic success in the content area of science,” echoing WIDA standard #4: MCMLs “communicate information, ideas and concepts necessary for academic success in the content area of science”; and to help MCMLs “learn language that will be used recurrently in and across various academic and social contexts,” echoing WIDA standard #1: MCMLs “communicate for social and instructional purposes within the school setting.”

Introductory matter explains that “the unit offers students contextualized, extended practice with discourse, sentence, and word/phrase dimensions of academic language targeted in the unit,” reflecting WIDA’s three dimensions of academic language. By the end of the unit, students are expected to use language to “pose a research question, conduct research related to this question, and present findings from research” (MADESE, 2016a).

The embedded language development of “Animals” centers on three of the WIDA Key Uses of Academic Language: Explain, Recount, and Discuss. Each Key use, or macro function, was combined with micro functions to create three Focus Language Goals (FLGs) for the unit: “Discuss by inquiring in order to build and present knowledge gathered through research,” “Recount to summarize and record research findings,” and

“Explain by elaborating to build and present knowledge on a substantive topic.”

Introductory matter explains that the FLGs were “created through an analysis of the driving language demands” of a Grade 1 science model curriculum unit: “Informational Text, Research, and Inquiry Circles: Animals and Habitats.”

The process writers used to develop the four ESL units, including “Animals,” generally follows the layout of the Tool. As indicated in the top row (“Content Area Connection”) writers first selected a disciplinary area: science, linked to WIDA standard #4. In choosing the “Specific Academic Context,” writers grounded themselves in the culminating performance assessment of an existing science unit: “Informational Text, Research, and Inquiry Circles: Animals and Habitats.” After analyzing the driving language demands of an authentic disciplinary performance assessment, writers developed FLGs by combining relevant macro and micro functions. Writers used the flexible formulas in Thinking Space 1 of the Tool to create the three FLGs.

Thus, for Understanding by Design (UbD) Stage 1 of unit development, writers were able to use the Tool to create clear unit-level goals (FLGs) drawn from the grade-level science context for the ESL unit. Writers developed language-focused overarching understandings and essential questions. As they continued the UbD unit development process, starting with the disciplinary and cognitive opportunities for learning, writers unpacked the unit-level goals into knowledge and skills to help set a map for lesson development. For this, they continued to consult the micro functions and hyperlinked sample paths for increasing language complexity to help inform the planning for language development throughout the unit.

The WIDA Standards Framework continues to be visibly applied to the unit in other ways. The “Transfer” section of the unit indicates the intention for students to use what they learn in “Animals” to “communicate for social and instructional purposes within the school setting;” to “communicate information, ideas, and concepts necessary for academic success in the content area of language arts,” and to “communicate information, ideas, and concepts necessary for academic success in the content area of science.” These broad statements about language use correspond to WIDA standards #1, #2, and #4. Other NGESL units and videos demonstrate application of WIDA in additional ways, such as by highlighting use of the WIDA Essential Actions, employing varied multimodal supports tailored to the students’ proficiency levels, and using and integrating of all four language domains.

All units show a clear interweaving of language development and grade-level standards. For example, a section of the “Emotions” video calls out the connection to the CCSS ELA/literacy standard for kindergarten: “Use a combination of drawing, dictating, and writing to narrate a single event or several loosely linked events to tell about the events in the order in which they occurred, and provide a reaction to what happened,” and “Perspectives” calls out the Massachusetts History/Social Studies standard for grade 3: “Explain important political, economic, and military developments leading to and during the American Revolution.” Raw video footage adds teacher reflections on using the Tool as a foundation for unit development that incorporates both state academic standards and WIDA ELD standards.

Annotations on the “Perspectives” video explain that the interweaving of language and content standards are meant to engage MCMLs in higher-order thinking

within challenging grade-level content. Perry notes that at the time of filming she had been involved with the NGESL for 2 years, and states that she believes in its “positive impact on student learning” (Kray, 2017). It should be noted that all NGESL units are commonly united through an interweaving of themes around social justice, as determined by unit writers.

The NGESL unit development processes and products are emblematic of some important principles. First, teachers are involved in the development of the units they will implement with their own students. They are respected as experts who engage in joint inquiry and are supported through coaching and professional development as they continue moving along a professional learning continuum. There is an investment in building the capacity of local teachers, the very people who are the frontline of interaction with students within the massive educational apparatus. Teacher sense-making is nurtured through the supported collaborative development of curricular units and educational experiences they will deliver to students. Thus, teachers’ human-ness (identities, internal experiences, beliefs, and ideologies) is not excluded from the creative planning and execution of the work they do with students. They are positioned as agentive historical beings who discuss not only academic and language standards, but also the conditions of existence that they and their students find themselves in. This is the kind of space within traditional structures of public education where we may insert openings for critical dialogue. In embedding a theme of social justice in the units, teachers must indeed dialogue, self-examine, and explore multiple views of reality, including their own.

Second, this analysis shows some of the ways in which the development of the NGESL Tool and its processes *in collaboration with teachers* helped them to enact aspects of language education policy (language development standards) that were, simply put, not sufficiently practical and concrete for classroom operationalization. This more inclusive, more democratic process legitimizes teachers in crafting solutions that are exemplified in the curricular units, including alignment to grade-level content that is respectful to MCML’s developmental age; unpacking the language demands from the context of academic content; the systematic, explicit, and sustained development of the dominant language; use of various aspects of the WIDA framework (dimensions of academic language, Key Uses of Language, proficiency level descriptors); and a clear process from which to develop language-driven, unit-level goals; among others.

Tier 3 Theme 2: Bay School Processes and Experiences Related to the Collaboration Tool

In this section, I describe *processes* and *experiences* at the Bay School related to the Tool while touching upon the larger context of the Blackstone district. Building on the data from previous sections, I continue layering on a thick description with findings from the Bay focus group, interviews, and by incorporating elements from additional Bay documents.

Moira, the Bay School’s and Blackstone District’s ELE Director, remembers how she got involved in the NGESL project. Shortly after Massachusetts adopted the WIDA standards in 2012, Moira realized that they did not provide sufficient “specificity” to help drive the development of ESL curriculum. Unsure where to go next, Moira and the Blackstone team “looked at lots of published ESL materials and tools” (Moira, interview, 2019). “Plugging and playing” with elements from these various sources, the Blackstone

developed an impressive “ESL Curriculum/Reference Tool” (available in the research database). The Blackstone team attempted to synthesize various components into their curriculum/reference tool: “WIDA [standards framework], by grades, by function, genre, word/sentence/discourse” in a thematic frame that included genres informed by systemic functional linguistics, as well as associated linguistic forms and features. Moira explains that the district was working to create a scope and sequence, and through an arduous development process, “got to the point of thinking about language functions.” Moira describes this early Blackstone curriculum tool as “a giant excel sheet. It was crazy!”

It was at this point in 2014 that Moira heard that the MADESE was starting an ESL curriculum project. Moira joined the NGESL Planning Committee early on: “I found there was a tremendous amount of work that went into that process and I was so impressed by it.” Moira explains that a lot of good thinking went into the Blackstone curriculum tool, but “when we saw... the way the Collaboration Tool turned out, it was an amazing support to the work that we'd been trying to do... It was very helpful” (Moira, interview, 2019). Reflecting on the ESL teachers who were introduced to the Tool at that time, Moira notes: “they love the Collaboration Tool” (Moira, interview, 2019).

Moira describes the Collaboration Tool “like a dynamic template that you can use in planning and instruction to ensure you have... many important elements of language embedded” (Moira, interview, 2019). Bella, the Bay School’s and Blackstone District’s Curriculum Integration Coach, describes the Tool in a playful manner: “it’s a unicorn, if you will,” indicating its multiple layers, expanding nature, and possible uses responding to teacher needs from the field. The Tool “really overlays many things that are thrown at

teachers in a very useful way that is understandable to them,” referring to the Tool’s incorporation of grade-level state standards, macro and micro functions and hyperlinked sample progressions, performance definitions, Thinking Space 1 with its flexible formulas for creating FLGs, and the more reflective Thinking Space 2 (Bella, Bay focus group, 2019). Bella continues: “It’s almost like this Collaboration Tool grows with the user. It has a very low entry point with a very high ceiling of learning” (Bella, interview, 2019).

When Bella works with teachers, she reports that an easy, “low-entry point” of the Tool might be writing FLGs “combining content and language” as supported by the flexible formulas. “Then we take them a little deeper. Oh, here are these hyperlinks, look at these. Oh, and let’s look at the proficiency levels, and how that works. Then take them deeper and say, oh, let’s write a curriculum unit with this in mind.” Bella points out that the Tool “dovetails so nicely” not only with designing your own curriculum but “as an overlay” to other existing curricula and activities, and that it also “allows teachers to utilize what they have and what they know” (Bella, interview, 2019).

Once development of the Tool was complete, Moira began introducing it to the Blackstone district (including the Bay School) “because I was excited about its potential” (Moira, interview, 2019). Moira’s first unveiling took place at an administrative retreat that included principals, assistant principals, and curriculum directors: “I wanted them to understand what the ESL curriculum initiative was becoming... [the administrators] were particularly excited about the micro functions.” Moira remembers feeling “really pleased” with the way they responded to the Tool: “one of the principals pointed out something that I have felt from the beginning. He said, this isn't just good for ESL

curriculum. This would be a great curriculum development tool for the content teachers to help them identify the language in their content areas... This is going to be very helpful for everybody” (Moira, interview, 2019). Moira hoped that principals and curriculum directors would use the Tool in their curriculum work for their content areas.

In 2015, Moira nominated Bella, Olivia, Mabel, and Perry to join the NGESL MCU Project’s writing, piloting, and video teams. Moira remembers that the team “spoke about how rigorous the process was,” and that they came to “value the process so much – they learned so much from it. They’ve spoken about that, that they became much stronger” (Moira, interview, 2019).

In 2017, once the NGESL units were published, the Blackstone offered PD about the Tool to its faculty. Moira and Bella recruited Olivia, Mabel, and Perry to help design and deliver the PD. Blackstone educators felt that using the WIDA standards to design UbD Curriculum left much to be desired as evidenced (Blackstone District, PD records and PowerPoint slides, 2017). One PowerPoint slide from the Blackstone PD (2017) on the Tool states that the NGESL introduced “a fabulous curriculum design tool,” streamlining many factors related to ELD standards that the Blackstone had been trying to address for many years. PD records (2017) specifically state that the Tool helps to operationalize WIDA standards, encourages collaboration between language and content specialists, and can be used as a foundation from which to build clear language learning goals in curricular units. The Tool is described as encompassing key linguistic interactions that support key academic practices. Reflecting on all the times she has offered PD on the Tool within and outside the district, Moira adds that “we’ve been doing

it for a few years now, and ... almost 100% of the teachers are very excited about it. They want to use it, they see entry points for themselves” (Moira, interview, 2019).

In 2018, CAL invited the Blackstone to join a grant designed to encourage partnerships between content and ESL teachers. As a result of Moira’s and Bella’s insistence, the tool figured prominently into the work that was done with CAL. Olivia, Mabel, and Perry were also brought into this project. During the semester of the CAL grant, participants wrote and unpacked FLGs and associated academic standards to create Stage 1 of UbD units. Moira explained that “content teachers see the Tool as a real vehicle for identifying the language of your content ... The Tool was really eye-opening for a lot of those teachers” (Moira, interview, 2019). Olivia, Perry, and Mabel served as coaches to small groups of content teachers, offering “feedback and critique” and replicating in a smaller scale the kinds of support they received when first learning about the Tool and developing the NGESL MCUs.

In the state of Massachusetts, all core content teachers and their supervisors are required to take a Sheltered English Immersion (SEI) course for obtaining or renewing their licenses. While the SEI courses may offer a good beginning, Moira notes that the required “SEI Teacher Course” and “SEI Administrator Course” are largely “strategy-based” (Moira, interview, 2019). She describes the courses as being akin to a recipe book with lots of ideas for strategies but explains that in order for teachers to use the recipes, they need to first have the ingredients, or an understanding of the disciplinary language. Otherwise, “it doesn’t matter how good the recipe book is. ... If they don’t understand the language of their content areas, then they don’t have the ingredients. They can pull up the recipe book, go to the kitchen, and they don’t have what they need to cook.”

Comparatively, Moira feels that the Collaboration Tool “provides teachers with what they need to cook.” To Moira, content connections to the macro functions (WIDA Key Uses of Language) give teachers “an immediate practical application for use of this Tool and identifying the language of the content area,” and the micro functions “really help with getting some examples of [language] features” at “the discourse, sentence and word-phrase” dimensions. Moira sees that the macro and micro functions help teachers think of “grammar... sentence structure... and what [ELs] should be doing at a particular level” within the academic content needs. Ultimately, Moira believes the SEI courses “did not provide people with deep understanding of language,” and the Tool provides a support to help address that gap, especially when ESL and SEI teachers come from a variety of backgrounds with language development (Moira, interview, 2019).

In addition to the in-district PD offerings and CAL grant, in her role as curriculum integration coach, Bella has additional opportunities to introduce the Tool to educators across the district. Bella shares that whether in “intentional training or informal discussions,” it is “always a Tool I bring to the table” (Bella, interview, 2019). Bella believes that the Tool “allows teachers to effectively target specific language and assess students' learning of that specific target. Teaching language is so complex and every student comes with a different knowledge set.” To Bella, “there aren’t a lot of things out there that can go across multiple types of curriculum that districts can just jump on board with, but the Tool is one of them that really cuts across all grade levels. It is well-designed, it is streamlined, efficient, and effective” (Bella, interview, 2019).

Like Moira and the Bay teachers, Bella states that educators should have formal training and sustained opportunities for practice to work with the Tool and its processes.

Moira, Bella, and the Bay teachers wish the district had more PD and formal collaborative structures to help teachers “really understand the depths” of the Tool and to support the kinds of work that it prompts, “but there’s just not a lot available” (Bella, interview, 2019). Bella adds: “even when there isn’t formal training, I still want to get the Collaboration Tool into [teachers’] hands. So I’ll do it in an informal way.” Bella weaves the Tool in informal conversations and coaching sessions, where teachers’ needs “come up more organically,” depending on their goals. In these cases, what Bella presents about the Tool varies based on the teacher’s immediate and long-term needs, as well as on their background knowledge: “it depends on what they’re interested in, what growth they want to do in their own development.” Bella helps teachers think through both content and language lenses: “it was part of the design, you know, ... it was named the Collaboration Tool because it bridges ESL and content teachers... I always say ‘I have an amazing tool for you. I’ve got to share it with you’” (Bella, interview, 2019).

When using the Tool as a support to help teachers make visible the language students need to meaningfully engage in the classroom, Bella asks teachers to think and write about the language they are expecting students to process and produce for a particular instructional sequence: “What’s the expected outcome of your lesson?” (Bella, interview, 2019). Bella works with teachers through this unpacking until “they go, oh, this is what I want to hear from a student after I do my lesson.” Once teachers can more concretely think about the language they will actually be using in the classroom, they use the Tool “to help map that out.” To Bella, this is a key “a-ha moment” for teachers. “Then they start really being able to go to the formula and the FLGs.” Bella sees these conversations as “entry points,” where she begins to show teachers “interesting things”

about the Tool so that “they want to know more.” From there, Bella begins to take content teachers deeper into the language. For example, Bella says that if a science teacher has determined that they will be working with “cause and effect,” the micros help the teacher think about where students are at a particular level of language proficiency, and where they need to go next to accomplish the disciplinary goals. Bella believes the Tool helps teachers not only make disciplinary language visible for students learning a new language, but it also helps teachers to be mindful of how they might need to differentiate for ELs. She clarifies that by “holding all students to the same expectation in the classroom,” teachers often expect students to start from the same place and to move forward in the same ways and at the same pace, but “in that way we’re not moving students as fast and intentionally as we could.” Bella says the micro hyperlinks are very helpful to get teachers on board because they are broken down by proficiency level, and help teachers see and plan for student language needs at various language proficiency levels (Bella, interview, 2019).

I asked Bella how she introduces the Tool to teachers. “For the first time I always say, I have an amazing interactive tool for you, with resources you can use to help break down the complex task of teaching language” (Bella, interview, 2019). I then inquired about how Bella notices teachers beginning to make sense of the Tool. Bella said that in general, “it depends on how they think and how they process, so it depends on the teacher themselves.” However, commonly the new “shiny object that they’re attracted to first” are the sentence frames and the micro hyperlinks. Teachers also tend to quickly gravitate to and embrace the flexible formulas for developing FLGs in Thinking Space 1, “especially math teachers, they take to that like fish to water because it is formulaic.”

Bella is quick to notice that while teachers can easily learn to write FLGs, “then the real work begins, when they start to talk about how that is going to manifest itself in the classroom.” In contrast to the general preferences Bella noticed for math teachers, she sees that ELA teachers tend to be more attracted to all the information contained in the micro hyperlinked pages. Bella notices that teachers understand the FLGs and the micros “fairly easily,” but if “if I leave them for a while,” upon return, many will have forgotten about the Tool “because they haven’t had the formal training,” and Bella reintroduces the aspects of the Tool she believes will be helpful for that teacher (Bella, interview, 2019).

Although the Tool can be used “individually,” as Moira described, or “informally,” as Bella illustrated, both Moira and Bella point to the importance and impact of the support that Olivia, Mabel, and Perry received when learning to use the Tool (Moira, interview, 2019; Bella, interview, 2019). Moira reports that those teachers have internalized the backward design process and the reflective process from Thinking Space 2, “and they teach to the highest caliber and it shows in their data.” Bella relates that Olivia, Perry, and Mabel now “do a really nice job of teaching the language that the students need in order to be successful in the classrooms.” Bella describes it this way: “they always begin with the end in mind...and they’re thinking clearly and concisely about the language goals ... and then they think very clearly about how to teach that. They still use the MCUs that they wrote. They really understand them.... So when they teach they know what to leave out and what to add in based on the students that are in front of them.” Bella speaks to how “their scores have been consistently high for over three or four years now. You can see the trajectory of their SPG scores for their students,” demonstrating faster growth than other teachers in the district. To Bella, this is

“very clear evidence that they learned something and then they sustained the implementation of what they learned. I’ve talked to the teachers and they said it totally changed their practice” (Moira, interview, 2019; Bella, interview, 2019). Moira continues:

Those three teachers have had consistently the best growth in ACCESS compared to other teachers in our district. Now there may be other factors that go into that and it's obviously a correlational thing, not causal, but when you see three teachers, all of whom have had this similar treatment, and they've all been involved in this intensive unit development using the Tool in a UBD process, and you see their student's language growth is better than others, you have to consider that this is a significant influence on that. And I believe that is true. So what I think teachers need is to be given these tools and given some substantial time over the summer or after school once a week for the whole school year to work on their own teaching using these tools with some support and in much the same way that the [NGESL] unit development process worked.... if we could [offer] ... ongoing PD at the local level, I think that's what teachers really need. (Interview, 2019)

Olivia notes that “as an ESL team, we’ve used the Tool a lot. ... We have themes that we use throughout the year ... and we make sure that we’re going to hit all of the macro and micro functions. ... We’ve also written new units” (Olivia, Bay focus group, 2019).

Isabel, another Bay ESL teacher, has been collaborating with two math teachers and a special education teacher. She describes their process for using the Tool to identify what language to prioritize for instruction in similar ways as others have done. First, the collaborating teachers closely examine the content standard they are going to teach, and from there they “break it

down... so that the students can access the math curriculum” (Isabel, Bay focus group, 2019). To this Moira added: “It has been my observation from the content teacher's perspective, [that] when they think about writing a language objective or infusing language in their lessons, they think merely about vocabulary, but I think this Tool provides more specific information for them about what's involved in language beyond just vocabulary” (Moira, Bay focus group, 2019). Lately, Isabel had been using the Tool to “beef up students’ oral language and speaking skills in the math classroom.” Isabel explains that the Tool helped to plan through the macro and micro functions, and the sentence frames helped to support students in bringing in more of “the clarifying language and the explaining language in math ... and that worked really well” (Isabel, Bay School Focus Group, 2019).

Mabel notes that the Tool helped to supplement the ELA curriculum, and points out that the Tool “helps teachers focus in a little bit more on the form and functions of language ... just to kind of bridge the gaps” (Mabel, Bay focus group, 2019). To offer an example, Mabel talks about teaching narrative at the beginning of the year: “you can pull out that first macro function, and then say, okay, well, what are [the students] going to be recounting? And then you can look at it a little more specifically from there – they are recounting by describing (a micro function) a story about themselves.” Mabel then considers what scaffolds students may need. She adds that the Tool “can help a lot with providing your instruction some guidance to where the students are going to go” (Mabel, Bay focus group, 2019). Moira explains that sometimes teachers “might be stuck with a math series ... and they can’t write units because they are supposed to be implementing something pretty much as is with some modifications,” and the Tool is very helpful in such situations for increasing the language lens in boxed curriculum (Moira, interview, 2019). Other Bay teachers note

that they have used the Tool to help support student writing and editing, and in general express the feeling that the Tool “makes us more aware” of language. Bella reports that “from a district point of view ... it actually allowed us to design curriculum with FLGs,” and that the Tool helped to “balance” the curriculum and curricular maps. She continues: “so there really has been a utilization in Blackstone at all three levels, district, classroom, and student levels in terms of implementing and utilizing the Collaboration Tool in different ways, but still focusing on the macros and micros” (Bella, Bay Focus Group, 2019).

When asked what inherent aspects of the Tool (as opposed to external barriers such as lack of time and PD) teachers might find unappealing or difficult, Moira shares that she does not believe that Thinking Space 2 is used very frequently. An immediate challenge Moira points to with Thinking Space 2 is its jargon: “I heard a question that came up constantly: what does contingent that mean? What does language as action mean? ... That phrase is off putting to people who don't have language backgrounds” (Moira, Interview, 2019). Moira believes that Thinking Space 2 is helpful, and speculates that perhaps teachers don’t use it as much because “it’s a highly reflective aspect of the Tool,” and given teachers’ tight schedules and multiple demands, maybe “they don’t take the time that they need to reflect on that.” She adds that this is also a function of teachers not having protected time for PD in order “to actually put reflective practices in place and in order to see the value of it” (Moira, interview, 2019). Moira reports that the three Bay School teachers have internalized and regularly use the reflective process that is presented in Thinking Space 2.

Bella agrees that “sadly, it’s the Thinking Space 2, the most powerful part of the Tool” that teachers in general tend to use the least (Bella, interview, 2019). Bella

elaborates that “a lot of training needs to happen” for teachers to really utilize that reflective space in the same way that the Bay teachers do, so that “it is embedded into their daily practice.” Bella explains that once FLGs are established in the front of the Tool and in Thinking Space 1, Thinking Space 2 asks teachers to convey “what do I observe in my students work? What can my students currently do?” Bella sees teachers struggling with this because of the various student levels in the classroom, and the different possible pathways to move students forward. Bella notes that teachers “might not even realize that a student may be able to write an incredibly persuasive letter in a different language, but they just can’t write it in English.” She laments that sometimes teachers assume that students “come as a blank slate, and we all know that’s not true.” Bella conveys that there is “a whole thought process that I see Olivia, Mabel, and Perry have conversations about when they are doing their planning that I don’t necessarily see all teachers thinking about.” This involves a careful and deliberate envisioning of “teacher moves to think about what they’re going to do in order to focus on the goal and what they want their students to do in order to reach those goals.” To Bella, this is a type of metacognition that “you can train teachers to do in a very concise way that is effective in changing practice ... according to the data and my experience working with this” (Bella, interview, 2019). Bella laments that she has not yet figured out how to foster this type of reflective practice with teachers outside of the protected time that formal trainings offer.

Bella further adds that this more interactive, reflective, and metacognitive process about how to “teach the students who are actually in front of you” is a deeply personal process (Bella, interview, 2019). Teachers are “pulled in a lot of ways” and have many

demands placed on them. They have pacing guides, metrics, and goals to meet, so they try to “just get that done.” “The Thinking Space [2] pumps the breaks on that [so that teachers can] look at what they have to do. They are allowed to take into account what the students in front of them can currently do and take a breath, instead of ‘what am I supposed to do with all of the pressures coming from above?’” To Bella, this type of contingent planning based on student need is personal because it’s about the relationships between teachers and students. “It depends on what the students need.” Bella witnesses the three Bay teachers regularly engaging in this process: “They have their goals, they know what they want their kids to do, but then they make the adjustments each year based on what their kids in front of them can do and what and how they can use the leverage from their relationships to get them to where they need to go. And that's why it's personal. Because in teaching we're not making widgets in cogs, you know. We are creating human beings that we hope can think outside the box, and this thinking space helps teachers to do that” (Bella, interview, 2019).

Moira named an additional barrier to engaging in the reflective practices embodied in the Tool: local pressures related to high-stakes assessment scores (Moira, interview, 2019). According to Moira, these pressures often usurp time and funding that could otherwise be spent on PD and practice. Bella also touches upon the many different initiatives and competing demands that are there to “grab teacher’s attention” all the time. Moira notes: “people learn by doing and they need to have intensive opportunities to apply the Tool within whatever is their actual day-to-day curriculum development efforts... The changes I saw in the three [Bay] teachers who ... actually had an opportunity because they were hired to write these curriculum units over many months

with lots of feedback and support. They came to understand UbD in a very deep way. They understand how to use the Tool. They understand unit development process, but what's even more exciting to me is they said to me, this has changed the way I teach" (Maira, interview, 2019).

Finally, Maira worries about institutional memory and continuity of supports for initiatives: "there needs to be a plan for ongoing support. It can't be one and done" (Maira, interview, 2019). As Maira retires from Blackstone, she asks: "who's going to take this on now?" She worries that teachers may also leave or be moved around to different schools: "teachers come and go, and the teachers at Bay School may not be working together. They may go off in different schools. Will they cross-pollinate? That would be great. Or will they just start doing something different?" (Maira, interview, 2019). Bella, who is staying in the district and with the Bay teachers, reports that while she believes the district has made great strides, "we are starting from scratch again because we have a new superintendent, a new assistant superintendent, a new ESL director, and six new principals out of seven schools.... I don't know what this administration's visions are or where they're planning on taking us" (Bella, interview, 2019).

Beyond the school and the district, Maira also wonders about the MADESE's capacity and commitment to sustain its own initiatives: "what kind of support does the department of education envision for next crop of leaders who will come up, who will be leading this?" Maira's point is that for any initiative, or for deeper, reflective work, there needs to be "constant support or ongoing PD. Otherwise, work ends when people move on" (Maira, interview, 2019).

Summary and Conclusion

Chapters 4 and 5 discussed the findings of this research using a tiered case study methodology that included an exploratory (2014-2018) and a formal (2018-2019) period. Chapter 4 examined the Tool designers' intent and how educators across one state used the Tool in practice. Chapter 5 examined how educators within one school made sense of and used the Tool. Perceptions from educators in one school largely echoed those of statewide users. In turn, both statewide and one-school perceptions of the Tool resonated with the designer's intent for use.

From a technical perspective, the main resounding themes from participants' voices included the fact that the collaboratively designed NGESL Collaboration Tool facilitates the operationalization of WIDA ELD Standards in classrooms across the state, including through practical and concrete processes that support teachers in unpacking the language of the academic context. The Tool does this primarily through its identification of high-leverage macro and micro language functions that (a) support the simultaneous development of content and language and (b) lend themselves to the creation of language-driven unit goals and lesson objectives.

Many statewide and Bay School educators expressed relief at how the Tool facilitated such processes. Moira expressed it thus: "it was an amazing support to the work we'd been trying to do" (interview, 2019). Separately, Bella added: "It overlays many things that are thrown at teachers in a very useful way that is understandable to them" (Bella, interview, 2019). Importantly, findings from this study indicate that educators find the NGESL Collaboration Tool critically important to their work with MCMLs.

In examining the intention, use, and meaning-making around the Tool, this study documents a significant example of the types of tools and processes teachers find most useful around ELD standards, pointing to possible ways that policymakers and future standards designers can better balance the needs of politics and theory with what is possible in the realm of concrete action in the classroom. In this sense, the study hints at potential directions away from the common practice of prescribing “recipes” for teachers without the available “ingredients” from which they can create meals for students, and instead to develop policies, tools, and processes that honor the chef (teacher) and “provide those teachers with what they need to cook” (Moira, interview, 2019).

Moreover, the findings offer productive insights into the perceived barriers to using the Tool (such as the feeling of being “overwhelmed” at the initial introduction to the Tool); where there are opportunities for enhancement of the Tool (such as making the macro and micro language functions discipline-specific, expanding the features detailed in the micro functions, and adding examples at various grade levels); and to consider what alternate solutions might need to be developed to continue supporting educators to deliver grade-appropriate, high-quality, engaging, responsive, and challenging curriculum to MCMLs that simultaneously addresses their linguistic and academic strengths and needs.

Also important are the more challenging Thinking Spaces in the Tool that promote reflective practice, and its multiple expanding layers that seem to “grow with the user” (Bella, interview, 2019). Although reflective use of the Thinking Spaces can be constrained given limited time and multiple demands placed on teachers, it appears to be the bridge that can connect the more technical exercises of the Tool with its larger

sociocultural pedagogy, and in Bella’s words, to address variability -- and humanness -- of both students and teachers. The Thinking Space requires a careful and deliberate envisioning of “teacher moves,” given many possible “different pathways to move students forward,” including consideration of MCML’s interest, multilingual repertoires, previous experience, etc. – all the while not forgetting that these students are already doing the double work of simultaneously learning a new language and challenging content (triple the work if they are also new to the culture in U.S. schools). This prompts teachers to increase metacognitive awareness for the planning of many moving pieces, especially those related to human aspects that are not easily coded into numerical or standardized systems.

The next and final chapter offers this study’s overall discussion and conclusions.

CHAPTER 6

DISCUSSION AND CONCLUSION

This chapter offers a discussion of the major themes that emerged from this study. It begins with a review of the study's trajectory. I then discuss key themes and their implications for practice, research, and policy-making, all the while providing a bridge between findings, implications, and the literature. I also address the study's limitations and present a final reflection on process and positionality, including an account for the ways my voice moves between the linear assumptions of positivism and a more critical sociocultural stance to frame policy-to-practice play – a modulation of voice that reflects the many discourses I must “speak” to move my work forward in “the real world” as I weave my way through the differing paradigms of various stakeholders.

Study Trajectory

This paper began, through its title and preface, with an acknowledgement that politics and power influence our experiences in the educational system as students and professionals. It acknowledged a desire to cross borders, to weave through the changing tides of external authority and to dance with power, with languages, identities, cultures, and more.

Chapter 1 introduced the problem (educators were asking for help making sense of and operationalizing the WIDA standards) and provided a broad critical and democratic theoretical stance legitimizing educator voice to negotiate power and policy in questioning organizations that develop, publish, and monitor the use of standards in standards-based

systems. At a high level, this paper symbolically asked how educators maneuvered to creatively and intentionally engage with policy in their classrooms.

Chapter 2 described the methods for my literature review and built a conceptual framework that framed policy as a sociocultural practice of power (Hornberger & Johnson, 2007; Levinson et al., 2009; Menken & García, 2010). I reviewed broad educational policy trends and then looked specifically at language policies in the U.S., and more particularly at the federal requirement for ELD standards and the adoption of the WIDA Standards Framework in the state of Massachusetts. Next, I explored WIDA standards via two lenses: as a product and conveyer of the standards and accountability movement, and as covert resistance to the standardization movement. I reviewed empirical studies on the implementation of WIDA standards, and lastly, I briefly introduced the Next Generation English as a Second Language (NGESL) Project and its Collaboration Tool as one field-based response to the challenges voiced by educators around the practical implementation of the WIDA ELD standards.

Combining a critical democratic theoretical framework (Chapter 1) with a conceptual framework of policy as a social practice of power (Chapter 2), my study opened up spaces to position classroom educators not as simple receivers of policy (just as students should not be positioned as simple receivers of banked education), but as agentive historical subjects who have the potential to engage with the conditions of educational production. Classroom practitioners must be reckoned with as legitimate policy actors – whose identities, internal experiences, beliefs, and ideologies, as well as the sociopolitical and sociocultural contexts in which they exist – must be accepted as an inevitable part of the policy process.

Chapter 3 presented a methodological overview and a rationale for the tiered case study method of inquiry utilized in my research to inquire about a) what designers intended for the NGESL Collaboration Tool; b) for breadth of understanding, how users across the state use the Tool; and c) for depth of understanding, how education actors in one school make sense of and use the Tool. I discussed my exploratory (2014-2018) and formal (2018-2019) data gathering phases of the study. These data sources spoke to how educators across one mid-size state (Massachusetts) and within the ecosphere of one school (the Bay School in the Blackstone district) utilized the Tool to make sense of and operationalize the WIDA ELD standards to design curriculum in standards-based systems. I specified the data collected for each tier of the study (corresponding to each research sub-question), as well as data management and analysis. Primary data for this study was collected through focus groups, interviews, surveys, and analysis of documents and videos. Secondary data included interviews, focus groups, surveys, and additional analysis of documents. I detailed procedures and instruments, the selection of participants and sites, ethical considerations, and researcher positionality. I described my approach to data analysis and addressed the trustworthiness and of the case in terms of validity, reliability, and generalizability.

Chapter 4 began by discussing the ways I have had to navigate my own voice to straddle the various discourses that different stakeholder groups (policymakers, practitioners, academia) tend to privilege along with their associated paradigms (ranging from positivist to sociocultural and critical poststructural), thus setting up Chapters 4 and 5 to present the discussion of findings in moments that are more linear/positivist while allowing for others that give freer rein to critical sociocultural considerations. In this way, I continued to act upon my theoretical understanding that different discourses are associated with different

types of power; and that the creation of meaning is situated in the interaction between the subject and the object, the speaker and their audiences, and within the complex and interdependent social relationships that bind the world of policy and practice together.

Chapter 4 discussed findings and themes as organized by the first two tiers of the study, focusing primarily on the Tool from the perspectives of designers and statewide users of the Tool. Chapter 5, representing tier 3 of the study, provided an in-depth examination of how users in the ecosphere of one school made sense of the Tool, including an analysis of curricular units developed with the Tool, processes at the leadership level to introduce the Tool, and interactions between the director, coach, and ESL and content teachers. Chapter 5 concluded with a positioning of the Tool's Thinking Spaces as the bridge that can connect the more technical exercises of the Tool with its larger sociocultural pedagogy, thus standing against current trends for the narrowing of pedagogy, curriculum, and educator autonomy.

Finally, Chapter 6, informed by the theoretical literature and data gathered from various sources, interweaves participants' own language, the literature, and my own understandings to develop the following synthesized themes:

- Theme 1 – Like Getting New Glasses: The NGESL Collaboration Tool as a Response to The Challenge of Operationalizing the Generative and Dynamic Nature of the WIDA Standards
- Theme 2 – A Springboard for Conversation: Widening the Doorway for Content and Language Collaborations
- Theme 3 – A Dynamic Template for Immediate Application: The Tool and its Processes as Pathway for Systematically Unpacking Academic Language

- Theme 4 – The NGESL and its Insistence on Reflective Practice: Positioning Educators as Explorers, Researchers, and Intellectuals Informed by Sociocultural Theory and Inspired by Critical Pedagogy

Each of these themes and their implications are addressed below.

Theme 1 – Like Getting New Glasses: The NGESL Collaboration Tool as a Response to the Challenge of Operationalizing the Generative and Dynamic Nature of the WIDA Standards

I have a better understanding of WIDA standards and how to incorporate them into my planning. (Expeditions in Collaboration: The Collaboration Tool and Multilingual Learners PD evaluation records, 2019)

Findings from Theme 1 show various education actors in agreement that, although the WIDA Standards Framework offers rich supports in some ways, the generative and dynamic nature of the standards do not offer practitioners enough support to concretely operationalize them in backward design curricular development and delivery processes. These findings build on and finesse several previous studies that documented the challenge of operationalizing WIDA standards (A. Bailey & Heritage, 2014, 2014; A. Bailey & Huang, 2011; Elder, 2018; Karlsson, 2015; N. Lee, 2012; Molle, 2013; Westerlund, 2014).

Educators' perceptions of the difficulty of implementing WIDA ELD standards suggests a continuing and urgent need for Professional Development (PD) to support and facilitate teachers' sense making and successful operationalization of both ELD standards and the identification of linguistic demands embedded in content standards. This finding is echoed in Wolf, Wang, Huang, and Blood' study (2014) which shows that teachers' misunderstandings and varied interpretations of content standards for Multicultural and Multilingual Learners (MCMLs) are sometimes due to the teacher's varying perceptions of

the main objectives or language skills embedded in a given content standard, a task that should be made easier with the use of more precise ELD standards. Wolf et al. (2014) further argue that resources in PD offerings should explicitly present language skills and tasks that teachers should focus on when teaching MCMLs, along with support and scaffolding strategies.

Data coming from a varied group of education actors (curriculum developers; classroom teachers; directors of English Learner Education (ELE) programs, content area directors, and curriculum directors; principals and superintendents; coaches; and national technical assistance providers) indicated a need to be able to use ELD standards to create clear and concrete ESL and content unit-level goals with MCMLs in mind, a need that was unmet by the WIDA standards.

All data sources (including those in the NCC and Leathers et al. studies) indicate that the Tool's interweaving of content and language through the Focus Language Goals (FLGs), when supported by a sample process and prioritized high-leverage language helps educators to: improve implementation of WIDA standards; identify driving language demands within content area standards, units, and assessments; identify curricular priorities across content and language classrooms to create unit-level goals and lesson-level objectives; brainstorm unit and lesson plans, including differentiation; determine content-based linguistic priorities for ESL curriculum; increase the quality and rigor of ESL curriculum through the prioritization of contextualized language; increase the language lens in content units; and consider the development of language complexity in the three dimensions of academic language as aligned to the five WIDA English Language Proficiency levels. As a reminder, the "sample process" to support the development of UbD unit-level goals is present through

the FLGs and its accompanying protocols in the Resource Guide, such as the “flexible formulas.” “Prioritized high-leverage language” is present in the Tool through the macro functions (or WIDA Key Language Uses) and further supported by the micro functions and their sample hyperlinked progressions.

Participants especially highlighted the Tool’s “common language” and “common process” as important contributors to its success, as well as the fact that “all the necessary information” from multiple complex systems “is contained in one place,” thus creating “connections across resources” that helped to “streamline” the process of ELD operationalization into backward curricular design.

Implications for Practice Related to Theme 1. As lessons learned from the study on the Collaboration Tool and the literature indicate, WIDA ELD standards would benefit from further specifying language functions, features, forms, and genres from the context of academic and disciplinary learning (A. Bailey et al., 2005; A. Bailey & Heritage, 2014; A. Bailey & Huang, 2011; Cheuk, 2012; Council of Chief State School Officers, 2012; O. Lee, 2018b; Understanding Language Initiative, 2012), and to present them in a concrete and actionable way where education actors are able to use standards – in a standards-based system – as the bedrock from which to develop and deliver curriculum, instruction, and assessment (Perks et al., 2016; Wiener & Pimentel, 2017; Wiggins & McTighe, 2005). WIDA would benefit from synthesizing and streamlining its multiple and rich tools and resources into a map or process that can bridge and guide educator’s current understandings to allow them to more readily apply the wealth of linguistic knowledge that WIDA brings to instructional practice.

Theme 2: A Springboard for Conversation: Widening the Doorway for Content and Language Collaborations

- As a result of using the Tool and its processes, educators “better understood the importance of collaborating in designing ESL units, not just with other ESL teachers, but with content teachers as well.” (NCC, 2019)
- The Tool “provided a springboard for conversation with content-area teachers.” (Statewide participant, statewide questionnaire, 2019)
- “It's widened the doorway and people are ... really dialoguing.” (Statewide participant, statewide focus group, 2019)

The findings in Theme 2 continue to testify to the benefits that are afforded to MCMLs – and to the educators of MCMLs – when content and language educators are able to meaningfully collaborate to plan and deliver instruction. Of particular note, the Tool is credited with helping to “break down the notion that ESL teachers simply need to plan grammar lessons, or that content teachers don’t teach language” (Statewide user, statewide focus group, 2019). Across primary and secondary data sources, education actors reported that the Tool offers a “common language” and process that facilitates the collaboration of content and language educators, helps them feel better prepared to collaborate with other teachers, and prompts an increased interest in collaborating with other teachers (NCC 2019; statewide focus group, 2019; statewide questionnaire, 2019; PD evaluations, 2019; Bay focus group, 2019).

Although educators pointed out that the Tool can be overwhelming at first glance, most agreed that once they were “walked through” the Tool, their perception became one that framed the Tool as user friendly and streamlined, and ultimately all agreed that it makes

collaboration and curricular planning easier for both content and language specialists (Statewide focus group, 2019; Bay focus group, 2019, NCC 2019). Although not the only one across the state, one director in particular volunteered information to say that, as a result of bringing the NGESL and its Collaboration Tool to the district, MCMLs had “remarkable gains in academic performance,” and there was “a tremendous increase of understanding of the role of the ESL teacher, as well as how the district can best foster continued collaboration between content and EL teachers” (NCC focus groups, 2019). The director added that the Tool also facilitated “deep discussion” with the principals. Educators at the Bay School reported a similar experience (Moira, interview, 2019).

According to Moira, the Bay School’s and Blackstone District’s ELE Director, and Bella, the Bay School’s Curriculum Integration Coach, the students of Bay teachers who received training and support with the NGESL and the Collaboration Tool have showed consistently greater growth in ACCESS scores for the past 4 years, a change they attribute to their experience participating in the NGESL. Open responses in the NCC survey echo this experience for other teachers across the state.

Implications for Practice Related to Theme 2. Whereas WIDA encourages content-language collaboration in its framework, a stronger, more central positioning of its importance might do more to encourage a greater shift to collaborative practice among all teachers responsible for the education of MCMLs across its member states, territories, and international locations. This in turn could have implications on state policy regarding PD and licensure for teachers. Collaboration is a key practice to ensure an integrated pedagogical approach to developing MCMLs’ content knowledge, analytical practices, and subject-specific uses of language. Such integration is essential for delivering equitable

learning opportunities to increase the likelihood of academic success for MCMLs (Heritage, Walqui, & Liguanti, 2015). Shaped by the federal policy trends for the education of MCMLs since No Child Left Behind (NCLB)/ Every Student Succeeds Act (ESSA), schools have become high-stakes environments where MCMLs are increasingly taught in general classrooms (Davison, 2006; Harper & de Jong, 2009a; Leung et al., 2000; Leung, 2007; Meltzer & Hamann, 2005), and are expected to achieve the same grade-level academic standards and academic tests results – in English. Harper and de Jong (2009a) have argued that, in spite of the progressive pedagogy and inclusive rhetoric driving the mainstreaming of MCMLs, they continue to be marginalized in mainstream contexts. O. Lee (2018a) adds that the challenges related to the intersection between language and content learning cannot be attributed solely to the shortcomings of WIDA standards, but must be addressed by the joint expertise of language and content specialists. O. Lee (2018) calls out the longstanding division between the fields of ML and content area education, the relative isolation under which each has continued to develop, and urges educational systems to act: “in the era of alignment, such division is no longer viable” (p. 9).

Recent research and literature document that collaborative practices among teachers and school leadership benefits MCMLs (Haager & Windmueller, 2001; Pawan & Seitman, 2008; Ruiz et al., 1995; Sowa et al., 2007; Villa et al., 2013; York-Barr et al., 2007). In a time when content teachers often still do not see themselves as language teachers (Valdés et al., 2014), it is critical for teachers to work together to share expertise and to develop greater understanding of language and its use across content areas (Davison, 2006; Eckert, 2006; Egbert & Ernst-Slavit, 2010; Gibbons, 2009; Haager & Windmueller, 2001; Lave & Wenger, 1991; Ruiz et al., 1995; Verplaetse, 2017; Wong Fillmore & Snow, 2002; Yedlin, 2007).

Studies show that the collaborative design of instruction positively affects the implementation of curriculum change, as educators expand competencies and practice and develop ownership of the change (Voogt et al., 2016). In their study, Wolf et al. (2014) also argue that it is of paramount importance for content and language teachers to collaborate, a need that is exacerbated by the challenging demands of college-and-career-ready standards. Because teacher quality has been consistently identified as the most important school-based factor in student achievement (McCaffrey et al., 2003; Rivkin et al., 2005, 2005; Rowan et al., 2002; S. P. Wright et al., 1997), it is essential to ensure that all teachers share the responsibility of educating MCMLs.

In a review of the literature, Voogt, Pieters, and Handelzalts (2016) list various studies showing that the improvement of curriculum implementation and innovation is best achieved through the utilization of both teacher development and collaborative curriculum design (Drake et al., 2014; Garet et al., 2001; Penuel et al., 2007; Simmie, 2007; Voogt et al., 2011), but the authors also remind readers that curriculum change is not likely to succeed when teachers are simply regarded as practitioners who are expected to execute the plans of others (Ben-Peretz, 1990; Borko, 2004). Moreover, collaborative practices that are authentic and site-based lead to improved teacher knowledge, skills, curriculum design practices, and higher quality curricula. Under these conditions, teachers as co-designers develop ownership of the curriculum reform, and this agency ultimately contributes to improved teaching practices (Voogt et al., 2016).

*Theme 3 – A Dynamic Template for Immediate Application: The Tool and Its Processes as
Pathway for Systematically Unpacking Academic Language*

- The Tool “gives a pathway in a content classroom in how to incorporate language goals, while making sure the content is being taught.” (Expeditions PD evaluation, 2019)
- The Tool “helps me think about the language my students need on a more systematic level. It is especially helpful to support content teachers think about their content through a language lens.” (Statewide user, statewide questionnaire, 2019)
- “Students are making more explicit connections to skills from our ELD lessons to their classrooms.” (NCC survey, raw all-data files, 2019)
- “SEI teachers ... find the Tool helpful for all students to identify the language functions of their lesson and supports that they can provide.” (Statewide user, statewide questionnaire, 2019)
- The Tool “takes what is such a large entity of language learning and breaks it down.” (ESL teacher, NGESL video “Family Stories,” 2017)

In an effort to facilitate the process for educators to design language-driven curriculum within disciplinary contexts for MCMLs, developers reported the importance of prioritizing and naming “high-leverage, portable language” (NGESL developers, focus group, 2019). This is necessary because teachers have limited time with students but “a lot to cover.” The macro and micro functions, along with their sample progressions, are offered not as a prescription, but as suggestions for educators in their need to organize instruction and plan for language development in the context of the disciplines. The Tool capitalizes on

WIDA’s research in identifying the language functions that most commonly occur across content areas, appearing as the macro and micro functions. The micro language functions are beyond what WIDA chose to publish, and are enhanced by additional non-prescriptive, linguistic guidance that exemplifies possible pathways for growing linguistic complexity at each English language proficiency level. Created because educators requested it, and by teams of educators as informed by research, the sample micro function pathways, definitions, tasks, sentence and question stems represent a field-based approach for making various components of academic language more explicit. This evolving, non-exhaustive tool for teachers helps them unpack aspects of academic language to create clear but flexible instructional paths.

Linking theme 3 with the other themes, it appears that, although the Tool’s presentation of aspects and features of academic language is not new, it may be its integrated format, organization, streamlined layout, common language, and sample processes that appeal to educators as they elect to use it in their practice. Educators have reported that the Tool’s macro and micro functions, along with its hyperlinks, serve as an organizing principle to plan sequences of learning language in the context of the disciplines. The Tool seems to be speaking well to language and content teachers, who are reported to “see the tool as a real vehicle for identifying the language of your content” (Moira, interview, 2019). In general, the Tool seems to work as a “dynamic template” that offers teachers an “immediate application” in selecting “what language to prioritize for instruction” (Bella, interview, 2019).

Implications for Practice Related to Theme 3. Theme 3 is centered on the profound interconnectedness of language, learning, and knowledge in school contexts (Lucas

& Villegas, 2010), as language is the vehicle for human meaning-making (Vygotsky, 1978). It builds on a body of literature that insists that ensuring an integrated content/language pedagogical approach to developing ML's linguistic and disciplinary learning is essential for delivering equitable educational opportunities (Bunch, Kibler, et al., 2012; Bunch, Pimentel, et al., 2012; Gottlieb, 2013; Gottlieb & Castro, 2017; Harper & de Jong, 2009b; Heritage et al., 2015; Hull & Moje, 2012; Larsen-Freeman, 2000; O. Lee, 2018b; O. Lee et al., 2013; Moschkovich, 2012; D. J. Short & Fitzsimmons, 2007; TESOL International Association, 2006; Van Lier & Walqui, 2012; WIDA, 2012a; WIDA Consortium, 2010; Wong Fillmore & Fillmore, 2012; L. Wright & Musser, 2015).

Clearly, the integration of language and content is not a new development in the field of education of MCMLs, and has for long been a rallying call for WIDA; yet data shows that MCMLs continue to be marginalized in mainstream and general schooling contexts (Gándara & Contreras, 2009; Hochschild & Scovronick, 2004; Lopez & Lopez, 2009; MADESE, 2017a, 2017b; Mcfield, 2014; NASEM, 2017; Nieto & Bode, 2011; Park, O'Toole, & Katsiaficas, 2017; Ream, Ryan, & Yang, 2017; Ruiz-de-Velasco & Fix, 2000; Suárez-Orozco & Suárez-Orozco, 2002; UN General Assembly, 2018; UNESCO, 2018; United Nations, 2017).

WIDA's Theoretical Framework (2012) indicates that WIDA is in full agreement with the literature which posits that instructional approaches that address the academic and linguistic needs of MCMLs must take into consideration the educational, linguistic, cultural, and social resources that students bring to the classroom, and provide MCMLs with opportunities to engage with the content, with the language of the content, and with peers to develop the understandings and practices that are key to each content area, including English

language arts (Bunch, Pimentel, et al., 2012), mathematics (Moschkovich, 2012), and science (Quinn et al., 2012). Experts in general are in agreement that this strong focus on academic uses of language is of critical importance (Hull & Moje, 2012; Van Lier & Walqui, 2012; Wong Fillmore & Fillmore, 2012), as language develops not statically or disjointly from content but instead through dynamic use via intentionally scaffolded interactions that provide opportunities for meaning-making (Mercer & Howe, 2012; Valdés et al., 2018). What this study of the Tool can suggest to developers of ELD standards is that they further articulate the language MCMLs need to engage in grade-level curricula, including by elaborating on how specific language functions, features, and discourses might progress over time. The linguistic content of ELD standards would benefit from having greater specificity to be useful to language and content educators, as well as to curriculum designers. ELD developers would also benefit from further integrating practitioner voice in their designs, so as to develop products with a greater focus of these particular stakeholders and end users in mind. Of note, since participants of this study noted that the Collaboration Tool contained some jargon and seemed “overwhelming” at first glance, developers of future standards and related tools ought to consider further simplifying language and the initial presentation of concepts.

Theme 4 – The NGESL and Its Insistence on Reflective Practice: Positioning Educators as Explorers, Researchers, and Intellectuals Informed by Sociocultural Theory and Inspired by

Critical Pedagogy

This is the tool/framework that I sought and was desperately trying to create in my head during my first year of second-language teaching... I think it's brilliant. I do mean what I say above about student accessibility, specifically in terms of motivation,

and I also think it can't exist in a vacuum, but overall I think it's the thing we need to all be working on. (Statewide user, statewide questionnaire, 2019)

In various ways, participants from all 3 tiers of the study spoke to the fact that the Collaboration Tool, while focusing on language and content, lives neither in a decontextualized vacuum nor outside its larger pedagogical grounding. Three main subthemes repeatedly came up in terms of Theme 4: the NGESL's stance toward humanizing teachers, insistence on reflective practice, and the nurturing of students' agency and critical stance.

In terms of how it positions teachers, developers and documentation pointed to the idea that the NGESL “support[s] educators as explorers, researchers, and intellectuals.” In the data and documents reviewed, participants credited the Tool and its processes with helping to clarify, highlight, and strengthen the roles of language and content teachers within collaborative partnerships and within school buildings, and with increasing the confidence, expertise, and professionalization of language specialists. Specifically, educators were able to work with increasing confidence, expertise, and professionalism as language experts. Participants noted that the Tool and its processes “allow teachers to utilize what they have and what they know,” thus honoring the journey as each individual moves through their particular continuum of learning and knowledge-making. As the Tool has multiple layers and an “expanding nature,” it is seen as being responsive to different needs and to “grow with the user.” Developers and users also noted the importance of including teacher voices in the development and sustenance of the Tool.

Of note, developers and users spoke of the Tool as having emerged out of a need voiced by numerous educators, and of instances of educators “who have pushed from the

ground up to create times and spaces” where they can benefit from the Tool’s enhancements to their instructional planning and delivery. As I wrote this concluding chapter to my study, I saw a group of about five educators on my public Facebook page (“Pedagogy, Curriculum, and Policy for Multilingual Learners”) lamenting that, while the Massachusetts Department of Elementary and Secondary Education (MADESE) updates its webpage, the micro hyperlinks of the Tool are not active. One commented: “All the links ... are broken, so I can no longer access the micro function section that had awesome lists of sentence starters, how the usage looks at each level, etc. Does anyone know why this is happening?” Another user chimed in: “The links have been down for a while. This is an important interactive document that many people rely on... Beyond frustrating.” I also saw emails about the NGESL flying in the background from a listserv belonging to the Massachusetts Association of Teachers of Speakers of Other Languages (MATSOL) Low-Incidence Special Interest Group (SIG). One SIG participant suggested: “Hi Everyone, As I'm reading the [SIG] curriculum threads, I am wondering if anyone would be interested in forming a virtual 'book' group for reading the Next Gen ESL Curriculum Guide. Honestly, I think I could benefit from reading it cover to cover (and in order!) - and I would absolutely love to read it with a group. What do you think? Any interest?” One week later, 48 educators had joined the conversation: “It sounds like we are developing a critical mass of interest! I am looking forward to this.” Soon after, I heard that MATSOL would be launching an NGESL SIG in the fall of 2020. These online exchanges indicate that the NGESL and its Tool are sustaining its greatest source of energy: grass-roots organization from the voices of solution-seeking teachers sustained by the NGESL’s philosophical through line to support educators as leaders, intellectuals, and researchers.

The NGESL's support of educators is accompanied by an insistence on reflective practice. Reflection is encouraged in various ways, including in Thinking Spaces 1 and 2, and in the Tool's "expanding" and multiply dimensioned nature. Whereas the Tool is seen as having immediate applicability and "easy," "low entry points," as Bella has noted (interview, 2019), it is once teachers make it to the Focus Language Goals (FLGs) that "the real work begins," including in the prompting of metacognitive and metalinguistic aspects of learning. The Tool, its thinking spaces, and processes are predicated on the notion of "ongoing" and "sustained" cycles of planning, learning, and improvement (Marie, interview, 2019).

Ultimately, the reflective practices honor teachers as human beings and individuals working within complex and often challenging systems, but the end goal is to keep "students at the center," and to "allow ample opportunities for deep learning" (Vanessa, interview, 2019) so that MCMLs can "become increasingly aware and strategic in their use of language to negotiate meaning in various contexts" (MADESE, 2016e). Bella comes to mind again, in her reflection that teaching "the students who are actually in front of you" is a deeply personal process, since as Bella notes, this type of practice relies on the quality of human relationships developed (Bella, interview, 2019). In relation to how the Tool supports differentiation, Bella and other participants note that "every student comes with a different knowledge set," and we must honor the fact that "we're not making widgets in cogs, you know. We are creating human beings that we hope can think outside the box, and this thinking space helps teachers to do that" (Bella, interview, 2019). Here we come full circle to the developers' insistence that the NGESL take an asset-based approach with teachers and students; foster culturally-sustaining teaching and learning; and attend explicitly to

strengthening student agency and critical stance (Maire, interview, 2019; Vanessa, interview, 2019).

In this sense, the reflective practices encouraged by the Tool's Thinking Spaces – along with its associated local collaborative and capacity-building processes – rebels against current trends for the narrowing of curriculum and educator autonomy (Apple, 2006, 2018; Au, 2008, 2011; Biesta, 2006; Canagarajah, 2004; Johnson & Freeman, 2010; Levinson et al., 2009; Menken & García, 2010; Nolan, 2018, 2018; Norton & Toohey, 2004; Sahlberg, 2016; Sampson, 2018), and instead positions educators as critical agents who must navigate the human dimensions of policy as they continuously reconstruct it for each student and context.

The creation of metacognitive and agentic spaces for educators to engage in technical processes along with their own humanity – as well as their students' – also stands against the global neoliberal economic agenda that decontextualizes, objectifies, and commodifies beings in education; reduces creativity, exploration, and autonomy in education for the sake of efficiency, productivity, and rapid service delivery; reduces the imaginary of possible pedagogies and curricula; and denies individual, local, and contextual variability (Apple, 1999, 2004; Apple & Beyer, 1998; Au, 2018; Braverman, 1998; Cairney, 2011; Carhill-Poza, 2018; Carlsson, 1988; Enright, 2010; Noble, 1994; Palmer & Snodgrass Rangel, 2011; Patel, 2015; Sahlberg, 2016).

Implications for Practice Related to Theme 4. Theme 4 speaks to the notion that standards, language development, and any educational endeavor are not neutral technical exercises, but exist within pedagogies, ideologies, and power-laden structures. Any educational endeavor needs to consider more holistic approaches to poise learners and

education actors to unpack sociocultural, sociohistorical, and sociopolitical aspects of education and the world surrounding it. Rather than giving into decontextualized means-end rationalities, education should seek to humanize and liberate (Freire, 2000; Giroux, 1988; hooks, 1994; Teemant, 2018), connecting the lives and complex experiences that exist within classrooms to the world beyond its walls, all the while inquiring about the ways current educational approaches contribute to or challenge entrenched local and global disparities.

Annala Teemant (2015), lead author of the *Six Standards of Effective Pedagogy* to which the NGESL is aligned, argues that the educational field has underestimated the scope and depth of change needed to radically improve schooling for MCMLs, and that educators need something much more complex and holistic to unsettle current educational approaches in ways that counteract the continuing marginalization of MCMLs by school practices as well as by society. For Teemant, current disturbing disparities demand that educators unpack the sociocultural, sociopolitical, and sociohistorical aspects of education and society at large.

In a review of the history of the profession, Teemant (2018) sees that in serving MCMLs, practitioners have focused on three complementary but often isolated bodies of knowledge: those that focus uniquely on language, on learning, or on learners (Teemant places WIDA in the group that primarily privileges a focus on language over learning or learners, even if sociocultural context is mentioned in the WIDA Framework). Teemant's work strengthens the professionalization of teachers and teaching, and highlights the need for educators to understand and enact theories that simultaneously encompass language, learning, and learners in an effort to realize Andrews, Bartell, and Richmond's (2016) vision of pedagogies and practices that are humanizing and just, and that authentically dialogue with students' lived experiences in and outside of schools. This stands against an educational

policy climate that seeks to evacuate control – and close authentic dialogue and genuine democratic practices – from the classroom level in favor of concentrating power at the top layers of the bureaucratic hierarchies of the educational apparatus (Au, 2008; McNeil, 2000). It also stands in stark contrast to “New Taylorism” (Au, 2011), where curriculum is viewed as another clog to be standardized in line with a means-end rationality, as another technical operation that delegitimizes complex teaching skills such as planning and knowledge of students and communities, and in favor of achieving scores in high-stakes tests (Apple, 1995; Au, 2011).

Following Fullan (2007), Teemant (2015) urges educators to engage in a *reculturing* process to question and change entrenched habits and beliefs. As starting points for such an endeavor, Teemant (2015) offers sociocultural *learning* theory (Vygotsky, 1978) and critical *social* theory (Freire, 2000; Sleeter & Bernal, 2003). As well, Teemant echoes Ettlign (2012) in arguing that education should be about personal and societal change; Giroux (1988) in contending that democracies have a critical need to connect the goals of education to students’ lives, communities, and sociopolitical realities beyond the school; and Milner (2010) in asserting that educators must interrogate the overt and covert ways in which educational systems, processes, and institutions are designed to protect the status quo and sustain complex inequities in education. Against the standardization of teaching through increased managerial controls over teachers as workers and students as products (Apple, 1988; Apple & Beyer, 1998; Au, 2011), Teemant (2018) calls for teaching pedagogies and institutional practices that “affirm student identities, re-examine power dynamics in relationships between teachers and students in learning communities [and beyond], and expand student agency in the face of inequities” (p. 4).

The NGESL Project and its Tool, aligned with Teemant's (2014b) Six Principles of Effective Pedagogy, encourages educators in public schools to develop language where learners are seen as subjects living within larger social, cultural, historical, and political systems that can be challenged for the marginalization of segments of the population, and educators are poised to acknowledge that education is a political act that has the potential to be used a tool of liberation (Apple & Beyer, 1998). It is one of the reasons NGESL developers chose social justice as a unifying theme across units, and as a possible vehicle for changes they'd like to see.

Implications for Research and Policy

As various local, national, and global organizations have stated, much research is still needed to identify and fill gaps of understanding about how to best educate MCMLs in various contexts, specifically with regard to understanding the influences on their educational progress. The field would benefit from continuous research into examining WIDA's model as well as other ELD standards and their supporting frameworks, including: how they are operationalized in various contexts; how educators and other stakeholders make sense of them; what aspects of ELD standards frameworks are most effective in supporting MCMLs and their teachers; and how teachers, administrators, curriculum designers, and policy makers engage in various practices with a basis in ELD standards use and implementation. Importantly, studies are needed to inquire about how students benefit from WIDA and other ELD standards. Studies about benefits and/or approaches to using ELD standards could be completed across classrooms, schools, districts, states, and in international locations, especially as WIDA expands its global presence.

In terms of local and state policy, Marie's and Moira's words come to mind. Schools, districts, and states would benefit from following evidence-based practices to better sustain strategic planning for the education of MCMLs (Marie, interview, 2019; Moira, interview, 2019), as well as from developing deeper understandings of what is truly needed to be effective with a widely diverse population in the deeply human endeavor of education. A deeper commitment – and know-how – is needed to effectively implement initiatives where supports, resources, and institutional memories are capitalized upon and sustained over time. At the district and school levels, this also means providing well-structured, built-in, protected collaboration time supported by administration and ongoing PD and coaching that focuses on the needs and strengths of MCMLs. At the state level, policymakers should increase integration and collaboration among generally separate offices that deal with the content areas, language development, curriculum and instruction, assessment, teacher preparation, and licensure. States and local educational agencies alike must work to message and support the idea that all teachers are language teachers, and that, to enhance avenues toward equity, English as a new language should not be taught apart from its academic goals in school contexts. Tools – such as the NGESL Collaboration Tool – that offer a common language and process for the simultaneous development of content and language, and expand the knowledge of the user, may be helpful in such an endeavor, especially when appropriately supported by administrators, given sufficient time, and opportunities for ongoing professional learning. Various stakeholders in the school community should be invited to collaborate in designing the guidance and processes that affect their own practice.

Districts (as well as the state) would benefit from incorporating pedagogies of liberation and love (Freire, 2000; hooks, 1994) not only for its students but also for its

teachers, and take approaches to initiatives such as the NGESL that respect, nurture, and build on those voices, while avoiding taking top-down approaches that can dehumanize and deskill teachers, as though dispensing “packaged fragments of information sent from an upper level of bureaucracy” (McNeil, 2000, p. 5). This is especially important as various studies have shown that “policy is no *fait accompli*,” but is instead contested, negotiated, and reconstructed by teachers in the classroom (Zakharia, 2010, p. 178). Classroom teachers, as individual human beings working and living within complex systems, are historical and social actors who inevitably help to shape the character and outcomes of policy processes (Fairclough, 2013).

States should also consider how to more meaningfully include educator voice in policy and guidance development processes, as well as how to center those voices not only via a lens of accountability and oversight, but through a supportive role providing technical assistance, professional development, coaching, and maintaining open lines of communication to better understand how educators negotiate, contest, appropriate, and reconstruct policy in their practice.

Limitations of the Study

Like any research approach, case studies have strengths and weaknesses. Limitations to this study are centered on the nature of the tiered case study design. While my case study makes several contributions, data collection and analyses are limited in a number of ways. Great care was taken to minimize the limitations inherent in the case study design, and yet some elements remain for consideration.

First, the study focuses on trying to understand how the Collaboration Tool facilitates processes that promote the simultaneous development of language and content for MCMLs, a

process that is emblematic of how they negotiate the policy and practice (Menken & García, 2010) of ELD standards. I captured broad and deep data from developers and users in one state and in one school, but given different state expectations in educator preparation and licensure, differences among schools and classrooms, and differences in individuals' professional learning backgrounds and other variables (e.g., interests, ideologies), my findings may not be generalizable to other contexts. Still, results from this study are informative in other situations and settings beyond my actual case (Dyson & Genishi, 2005; Haneda et al., 2019; Hodkinson & Hodkinson, 2001), and its methods can be reapplied in similar future cases. Thousands of educators of MCMLs across the country face analogous issues of ELD standards implementation in the era of school reform. Although this study focused solely on the use of the NGESL Collaboration Tool in Massachusetts, findings may echo realities in other schools where actors are asking similar questions or facing similar challenges in the simultaneous development of content and language.

Second, the roles I have played in the field may have presented a limitation to the study. Participants' knowledge of my previous role working for the MADESE could have hindered their responses. I tried to assuage this potentially perceived tension by reiterating that their participation had no connection to or impact on their current jobs. I also attempted to counter this tension by explicitly asking participants to share their honest thoughts, and specifically asking what is not helpful about the Collaboration Tool so as not to collect only positive data. Additionally, I ensured confidentiality of data through consent forms, and explained to participants how I would do this before they agreed to participate.

My deep participation and knowledge of the field also raises the question of whether my "insider" status prevented me from being "objective." I have already addressed in earlier

sections of this paper how qualitative research rejects the assumption that true objectivity in any type of research is achievable. In fact, this position as "insider" worked as an advantage, as my previous experience and history with the topic and the field made me much more qualified to conduct the work that required deep immersion into the phenomenon being studied.

A third possible limitation relates to the concept of validity in case studies. Riessman (2008) and Yue (2009) point out that, given different types of data, myriad approaches to analysis, and multiple conceptions of data validity, there is no easy way to assess validity in case studies when compared to positivist expectations in quantitative studies. It is important to remember that, as previously stated, the importance of this concept of validity depends on the researcher's epistemological perspective (C. Street & Ward, 2012). All narratives, including the one through which I present my findings, are deeply steeped in various contexts, and are inevitably particular constructs co-created through various particular frames (Riessman, 2008). Without a doubt, the narrative I present is a result of my analysis and interpretation. While I recognize that any interpretation of data is only *one* of many possible "correct ways" of interpretation, if the interpretation is supported by the data, then it is valid. (Auerbach & Silverstein, 2003; Riessman, 2008). I went to great lengths to gather, organize, record, check, and triangulate the data that supports my interpretation.

I engaged in thorough preparation demonstrated through years of engagement with the field on the topic of ELD standards. Whereas the formal data collection and analysis phase of my study lasted approximately one year, my preliminary data collection and analysis on this topic began in 2014, so data-gathering lasted over 5 years. The case was clearly defined (use of the Collaboration Tool) and its purpose was clearly stated (to inform

future development of ELD standards and its supporting mechanisms). I conducted the study systematically, using procedures and protocols to support the rigor of the study, as documented in chapters 3 and 4, appendices, and the research database, accompanied by a collection of referential materials and a research journal (Davis, 2012; Dyson & Genishi, 2005; Yin, 2017). These materials left an “audit trail” (Guba, 1981) so that an independent party can reproduce the research process (C. Street & Ward, 2012), while also providing a “chain of evidence” (Yin, 2017) that makes transparent how conclusions were drawn from the data.

To reduce bias and improve validity, I gathered abundant data from multiple primary and secondary sources. I engaged in analytical triangulation within and across data sources to enrich the knowledge produced, minimize threats to internal consistency, and diminish potential weaknesses for the case (Denzin, 2009b; Yin, 2017; Evers & Staa, 2010; Priola, 2010). I solicited authentic feedback from participants (member checks), experts in the field (peer consultation), and academic institutions (my own cohort, professors, and dissertation committee) (Dyson & Genishi, 2005; MacQuarry, 2009; Riessman, 2008; Tobin, 2012; Yin, 2017).

Conclusion

The purpose of this study was to inquire about how the NGESL Collaboration Tool might facilitate processes that simultaneously advance language and content for MCMLs as a proxy for that central aspect of ELD standards implementation. The Collaboration Tool was developed by a field-based team, and in response to a call for help from practitioners in the field, as a “local layer” to make sense of and operationalize WIDA ELD standards in curricular planning with the simultaneous development of content and language. The

Collaboration Tool, as an instance of a phenomenon, is emblematic of a larger question involving how educators negotiate policy and practice (Bartlett & Vavrus, 2014; Bauman, 1991; B. Bernstein, 1990; Fairclough, 2013; Howarth & Griggs, 2012; Levinson et al., 2009; Menken & García, 2010; T. K. Ricento & Hornberger, 1996; Santos, 2007; Shore & Wright, 1997; Sutton & Levinson, 2001; Tollefson, 1991; Valdiviezo, 2010).

Better understanding the sense-making process and appropriation of policy (in this case, the WIDA ELD standards) through a practitioner lens (in this case, the development of and use of the NGESL Collaboration Tool) yielded several insights. On a technical level, this study contributed to a body of work that seeks to understand policy processes and the development of educational standards and related tools. On a theoretical level, it added to the literature that endeavors to: increase our understanding of the contextual, cultural, and political aspects of policy processes; open up more democratic spaces for decision-making in public education; expand and decentralize sites of legitimized knowledge-making; question the meaning of policy in practice; and interrogate how power continues to move and operate in educational contexts.

About six months before I finished this dissertation, WIDA invited me to join their standards development team. Thus, this study has directly contributed to the development of the 2020 Edition of the WIDA ELD Standards, currently in use in 42 U.S. states and territories and over 500 international locations. It is my hope that this study also helps to propel practice and pedagogy forward to ensure an equitable education for all students, including MCMLs.

Final Reflection: Notes on Process and Positionality

This final reflection addresses some of the ways my voice moves between the linear assumptions of positivism and a more critical sociocultural stance to frame policy-to-practice play. I wrote this dissertation from the position of someone who continues to straddle the worlds of local, state, and federal policymaking; classroom practitioners and district administrators; and academia. During this study, while I investigated moments of official policy making in relation to moments of appropriation through an academic lens, I also negotiated the realities of policy-to-practice in my “real world” of work, where I must continuously maintain open spaces to dialogue with state departments of education, standards-development organizations, practitioners, and scholars in the field of education and applied linguistics – each generally carrying different preferences in terms of the discourses and paradigms they privilege. As I engaged in qualitative sociocultural research into the everyday negotiation of the policy of ELD standards, I wondered how this dissertation could serve to support my work with these multiple audiences. In other words – my voice is both constrained and enabled by multiple existing structures, discourses, and audiences, and I seek ways to continue to exercise my agency in these shifting contexts. I too am a situated cultural animal, a creative agent appropriating and incorporating discursive and institutional resources into my own purposes.

Whereas I identify with an anti-positivist paradigm, framed by an awareness of the discursive nature of policy (Fairclough 2013), I seek to influence the reality of experiences of students in classrooms which are deeply steeped into the modernist, positivist, and neoliberal stances that generally govern public education systems in the era of school reform. Even as I attempt to validate more local, unofficial, and sometimes nonauthorized forms of policy, I

recognize that there is great power in the halls of federal and state departments of education that make official policy. Given that government institutions tend to operate from a positivist, neoliberal base (exacerbated under the Trump administration), I have learned to modulate my voices, at times speaking through the tools of official power to continue navigating such spaces, looking for cracks where I may be able to raise critical questions or invite a more democratized form of dialogue that includes the voice of educators, students, and their communities.

Through my ability to walk this tension between conflicting paradigms, I am able to sit at the table of large-scale policy-making spaces to periodically puncture the room with such questions as: what is the purpose of education? What do we mean when we say social justice? How are we actually shifting practices and resources when we say we want to better serve historically underserved populations? Where do these policies originate? Who is deciding which policy ideas are legitimate or not, and which deserve more discussion time and serious consideration? How do specific policies affect the material lives of our students and their families? How do these policies effectively organize spaces and populations? Which policy ideas, through discourse moves, become equated with meta-truths, and who benefits? In this, I join other critical scholars who also must operate in the world of more traditional policy and practice.

My younger voice might have argued more loudly and radically, but it would also not have been offered a seat to join the conversation at state and national levels. So I continue to ask: how do I use the language of power to at least have one voice in this tenuous and tense conversation? How do educators dialogue with power, even as it shifts and moves?

The truth is that power shapes the ways we speak, and if my goal is to improve the lived experiences of multilingual learners in public schools across the country, I must shape my own discourse so that it has a greater chance to be heard in such official spaces. I shape my discourse by demonstrating that I can present findings in a more linear, modernist paradigm, all the while framing the work through a more democratic, poststructuralist, and critical sociocultural lens. In moving between these voices, I include in my considerations those imbued with the power to sanction official policy in traditional spaces – even as I insist on naming the grass-roots development of communal voices and reflective spaces as purposeful practices that reinstate agency to a wider range of stakeholders. Such grass-roots organizing can be seen as local, individual, and communal efforts to work around market-based, neoliberal approaches to educational policy, thus holding the possibility to embody alternate values, ideologies, beliefs, and principles connected to a wider notion of critical pedagogy.

APPENDIX A

COLLABORATION TOOL

<p>Content Area Connection: This unit will address the language of the following content area(s) or WIDA Standards: SIL <input type="checkbox"/> LoLA <input type="checkbox"/> LoMa <input type="checkbox"/> LoSc <input type="checkbox"/> LoSS <input type="checkbox"/></p> <p>Specific Academic Context: Language development for this ESL unit will be contextualized in the following substantive topic derived from grade-level units, themes, or cluster of standards:</p>		<p>Collaboration Tool</p> <p>View the Interactive Guide to the Collaboration Tool</p>					
<p>Key Academic Practices and/or Standards</p> <p><i>Key academic practices may be replaced with the state standards themselves.</i></p> <p>In listening, speaking, reading, and writing with literary and informational language...</p> <p>Engage with complex academic language</p> <ul style="list-style-type: none"> Participate in grade-appropriate exchanges of information Produce clear and coherent language in which the development, organization, and style are appropriate to task, purpose, and audience Support analyses of a range of complex texts with evidence Use English structures to communicate context-specific messages <p>Use evidence-based communication (with opinions, claims, concepts, arguments, or ideas)</p> <ul style="list-style-type: none"> Paraphrase Analyze Summarize Challenge State (name) your own Support with reasoning and evidence <p>Carry out research</p> <ul style="list-style-type: none"> Plan and carry out inquiries Evaluate sources Build and present knowledge through research by integrating, comparing, and synthesizing ideas Communicate research findings <p>Take part in collaborative interactions</p> <ul style="list-style-type: none"> Build on the ideas of others and articulate your own Request clarification Discuss key points 		<p>Language: Key Uses of Academic Language</p> <p>Macro Functions</p> <p>RECOUNT</p> <p>EXPLAIN</p> <p>ARGUE</p> <p>DISCUSS</p> <p><i>"DISCUSS" points to the importance of the oral, interactive component of all the academic practices.</i></p>		<p>Micro Functions</p> <p>Select micro functions according to need and context. Click on the links below for sample progressions</p> <ul style="list-style-type: none"> Cause/effect Classify Compare/contrast Contradict/disagree Describe Elaborate Evaluate Identify/name/label Inquire Justify Predict Sequence State opinion/claim Summarize Insert any micro function as necessary 		<p>ELP 5</p> <ul style="list-style-type: none"> Multiple complex sentences presented in a cohesive and coherent manner. Multiple phrases and clauses with patterns characteristic of specific content areas. Academic content-specific and technical vocabulary. <p>ELP 4</p> <ul style="list-style-type: none"> Expanded related ideas in connected discourses with a variety of sentences. A variety of complex grammatical constructions with patterns characteristic of specific content areas. Content-specific and some technical academic vocabulary. <p>ELP 3</p> <ul style="list-style-type: none"> A series of extended sentences and related ideas. Repetitive and some complex grammatical structures with patterns characteristic of specific content areas. Some content-specific and academic vocabulary, including cognates. <p>ELP 2</p> <ul style="list-style-type: none"> Emerging presentation of ideas in phrases or short sentences. Repetitive, formulaic grammatical structures across specific content areas. General social, instructional, and content words and expressions, including cognates. <p>ELP 1</p> <ul style="list-style-type: none"> Single words, phrases, or language chunks to represent ideas. Phrase-level patterns and structures. Everyday social, instructional, and content words and expressions. 	
<p>Performance Definitions¹: <i>Language development is fluid and dynamic. Levels are not static, and can be different in different domains.</i></p>		<p>Thinking Space 1: Develop unit-level Focus Language Goals (FLGs) in the context of grade-appropriate topics and standards. FLGs should always include at least a language FUNCTION and a KEY ACADEMIC PRACTICE or content STANDARD stem.</p> <p>Below are adaptable "formulas" for creating FLGs to arrive at UBD unit Stage 1 goals.</p> <p>Key Use (macro) + key academic practice DISCUSS by building upon ideas of others and articulating your own claims.</p> <p>Key Use (macro) + micro function + key academic practice ARGUE by stating a claim supported with reasoning and evidence.</p> <p>Key Use (macro) + state standard stem RECOUNT to delineate a speaker's argument and specific claims, distinguishing claims that are supported by reasons and evidence from claims that are not. (ELA-Literacy SL.6.3)</p> <p>Key Use (macro) + micro function + key academic practice + substantive topic EXPLAIN by describing cause and effect to participate in grade-appropriate exchanges of information about the role that human activities have played in causing the rise in global temperatures. (STE 8.MS-ESS3-5)</p> <p>Write your FLG here:</p>					

Collaboration Tool: PAGE 2

***Please note:** "Students may demonstrate a range of abilities within and across each ELP level; second language acquisition does not necessarily occur in a linear fashion within or across proficiency levels. ...At any given point along their trajectories of English learning, ELLs may exhibit some abilities (e.g., speaking skills) at a higher proficiency level while exhibiting other abilities (e.g., writing skills) at a lower proficiency level.Since, by definition, ELL status is a temporary status, an ELP level does not categorize a student (e.g., 'a Level 1 student'), but, rather, identifies what a student knows and can do at a particular stage of ELP (e.g., 'a student at Level 1' or 'a student whose listening performance is at Level 1')." (Shafer Willmet, 2013b).

THINKING SPACE 2: Language as Action and Contingent Feedback

Consider: *If we plan language teaching with the end goal of college and career readiness in mind, we must consciously develop the key academic practices and habits of thinking that support student success in general education and ESL classrooms.*

1. Established goals	What are the desired learnings/FLGs? (At the lesson level, consider this in terms of your lesson's language objectives.)
2. Gather evidence	In relation to instructional goals: what do I observe in my students' work? What can my students currently do?
3. Teacher moves	<p>What do I do with student evidence? Based on observable student actions, how do I plan my next moves to most effectively support my students' development? What pieces come first, second, third, etc., as we focus on language development through Key Uses of Academic Language and key academic practices? How do I support my students and scaffold their learning?</p> <p>What types of contingent feedback might I give to students based on what I see in their performance? How will my teacher feedback help students take action to achieve established learning goals?</p>
4. Student moves <i>For particular purposes, in specific contexts, together with other learners, and with certain outcomes.</i>	<p>What types of moves do my students need to make to increase language proficiency and advance toward college and career readiness? What language will I hear and/or read from students as they engage in different activities?</p> <p>How will students monitor and assess their own individual progress toward established goals?</p>

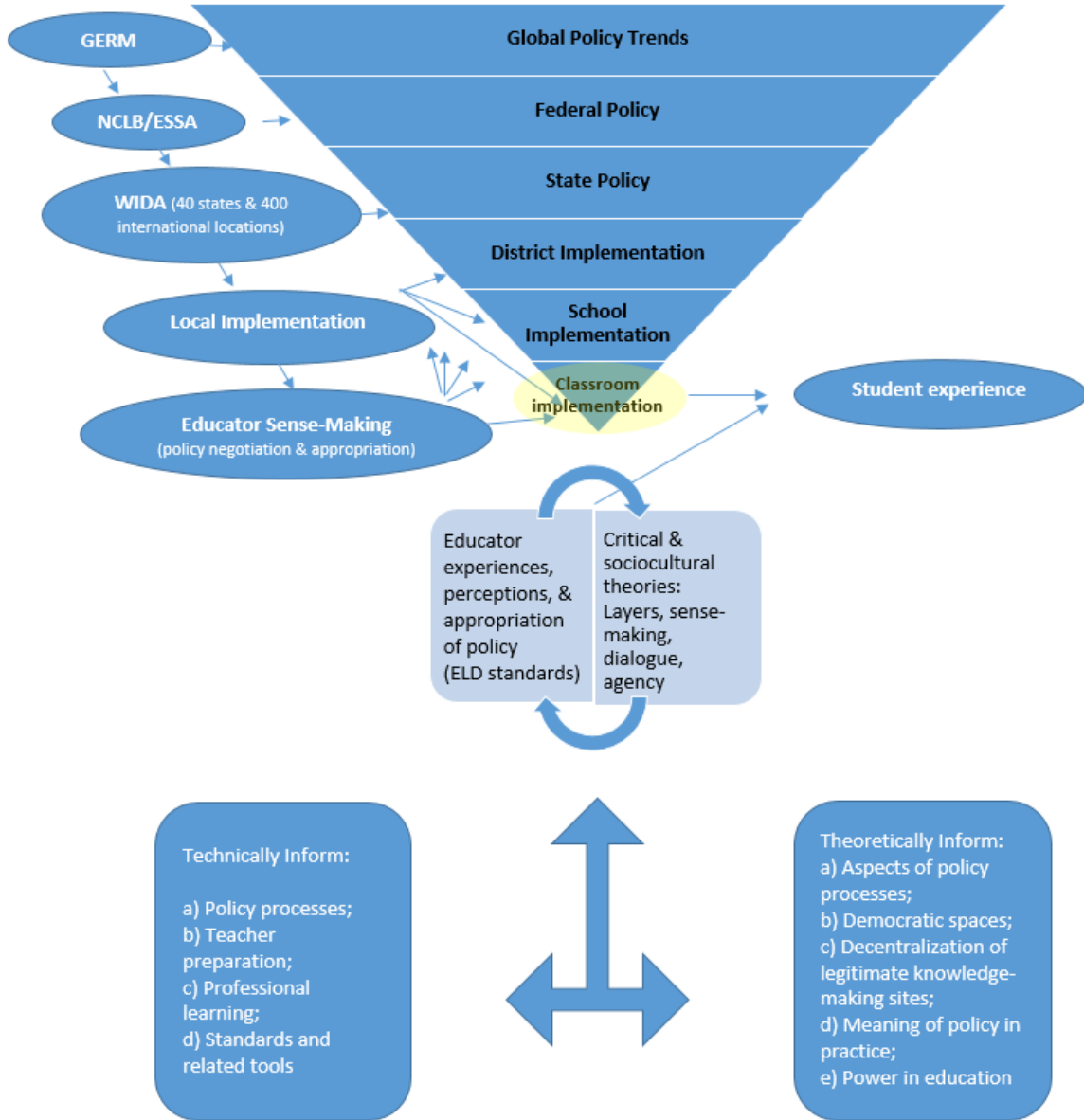
APPENDIX B

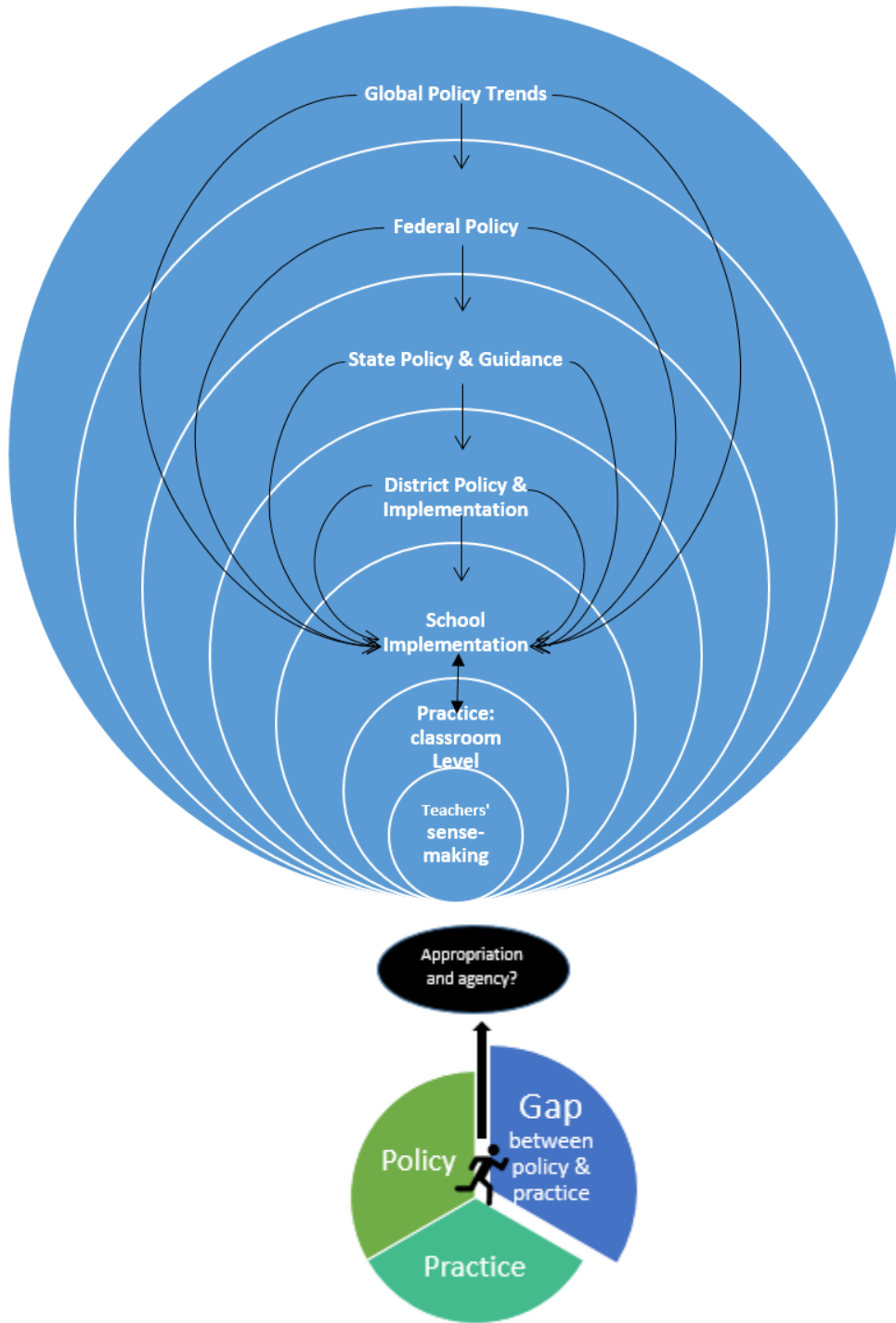
GLOSSARY

BICS	Basic Interpersonal Communication Skills
CAL	Center for Applied Linguistics
CALP	Cognitive Academic Language Proficiency
CCSS	Common Core State Standards
CCSSO	Council of Chief State School Officers
ELA	English Language Arts
ELD	English Language Development
ELE	English Learner Education
ELs	English Learners
ELBPO	Language Proficiency Benchmarks and Outcomes for English Language Learners
MADESE	Massachusetts Department of Elementary and Secondary Education
ESL	English as a Second Language
ESSA	Every Student Succeeds Act
FLG	Focus Language Goal
MATSOL	Massachusetts Association of Teachers of Speakers of Other Languages
MCU	Model Curriculum Units
NASEM	National Academy of Sciences, Engineering, and Medicine
NGESL	Next Generation English as a Second Language Project
NCC	Northeast Comprehensive Center
NCLB	No Child Left Behind
MCU	Model Curriculum Unit
MLMC	Multilingual and Multicultural students
PD	Professional Development
SEI	Sheltered English Immersion

APPENDIX C

VISUAL REPRESENTATIONS





APPENDIX D

PRELIMINARY DATA COLLECTION SUMMARY

Data Collected (2014-2018)	Description: Primary Data
Document review: NGESL Project development meeting records	NGESL Planning Committee meeting agendas, protocols, materials, notes, and attendance records: 24 official meetings between May of 2014 and May of 2016, with additional informal meetings, discussions, and interviews
Document review: Professional development records for unit writers	Orientation and support for the entire group of 14 writing teams of the NGESL units (September 18, 2015). Each unit-writing team included 3-4 educators, and both language and content expertise. 19 districts participated in this PD as an orientation to unit writing: Attleboro, Auburn, Boston, Brockton, Burlington, Chelsea, Fall River, Fitchburg, Framingham, Holyoke, Lowell, Milford, New Bedford, Oak Bluffs, Randolph, Shrewsbury, Somerville, Springfield, Wakefield, and Waltham. Teams of writers were then coached through the unit writing process.
Observation: coaching conversations for unit writers	Observed several conversations between coaches and unit writers (Fall 2015)
Document review: Coaching records for unit writers	Review coaching records for 14 individual writing teams of the NGESL Curriculum Units, including teacher reactions and reflections. (Fall 2015 – Spring 2016)
Document review: 12 NGESL Units	Analysis of final products (Fall 2016-Spring 2017)
Document review: 9 raw videos	Raw videos of 9 teachers implementing the NGESL units in classrooms across the state, including teacher interviews and reflections. (Summer – Fall of 2017)
Document review: 8 final videos	Final annotated footage of 8 teachers implementing the NGESL units across the state. (Fall 2017)
Informal Interviews: visits to districts implementing the NGESL	Visits to over 14 classrooms across the state implementing the NGESL, including discussions with practitioners and sponsoring administrators (Spring 2017 – Fall 2018)
Observations: Professional development	Observations of professional learning offerings related to the Collaboration Tool (FacT Expeditions), including informal discussions with participants about the Collaboration Tool (10 days). (Summer 2016 – Spring 2019)

<p>Informal Interviews: discussions with practitioners developing meetings or PD about the NGESL</p>	<p>Informal discussions with over 19 educators delivering faculty meetings or professional learning offerings across the state. (May 2016 – May 2019)</p>
<p>Observations/informal interviews at MATSOL conference</p>	<p>Observations and/or discussions of over 6 presentations at MATSOL 2018 that focused on the Collaboration Tool (May 29 to June 1, 2018). Presentations included:</p> <ul style="list-style-type: none"> • Building an ESL Map and Curriculum by Planning for Flexibility • Supporting Collaborative Sheltered English Immersion (SEI) Teaching with PD on Functional Language Analysis • Take the DARE! Key Uses for Curriculum and Lesson Planning • New, Ready-to-Use ELL Curriculum Units at Your Fingertips! • Next Generation ESL - One District's Approach • Using the Next Gen ESL Collaboration Tool for Planning
<p>Memos</p>	<p>Memos documenting reported use of the Collaboration Tool within and beyond Massachusetts.</p>

APPENDIX E

TIER 1 – DOCUMENTS REVIEWED

Document	Relevance to study
Collaboration Tool (MADESE, 2016a)	Analysis of object itself being studied
NGESL Resource Guide (MADESE, 2016e)	Contains thorough descriptions of the Tool and rationales for its creation and use
Interactive Guide to The Collaboration Tool (MADESE, 2017a)	Lives on the MADESE website as a ‘walk through’ for users to explore the Tool
Announcements and blurbs on MADESE website about the Collaboration Tool (MADESE, n.d.)	I checked for intent and consistency of messaging
NGESL MCU FAQ (MADESE, n.d.)	Frequently asked questions posted on MADESE website about the NGESL Project
NGESL MCUs (MADESE, n.d.)	12 ESL model curriculum units developed using the Tool as a base (2017)
NGESL raw and final videos and annotations (MADESE, n.d.)	8 videos of teachers teaching a lesson from the NGESL units. Raw videos include teacher reflections on the development process and use of the units and Tool. (2017-18)
Development records for NGESL-related professional development, including facilitator materials (MADESE, 2016b, 2019a)	Reveal primary objectives and considerations for using the Tool, including content, ESL, bilingual, and specialist teachers in both Sheltered English Immersion (SEI) and bilingual contexts (FacT and Expeditions)
Guidance on Identification, Assessment, Placement, and Reclassification of ELs (MADESE, 2016d)	State policy and guidance around expectations for use of standards, curriculum, and instruction for MCMLs
Guidance for Sheltered Immersion Programs (MADESE, 2019b)	State policy and guidance around expectations for use of standards, curriculum, and instruction for MCMLs in SEI programs
Tiered Focused Monitoring criteria (MADESE, n.d.)	State monitoring criteria around expectations for use of standards, curriculum, and instruction for MCMLs
Legislative Reports (2014 – 2018) (MADESE, 2015b, 2016f, 2017b, 2018)	Reports to legislature how professional development funding for teachers of MCMLs has been used. Includes rationales and various mentions of WIDA and NGESL-related PD.
Report submitted from the MADESE to the federal government for peer review (unpublished, 2018)	Criteria 1.1 and 1.2 are related to standards use. Massachusetts’s rationale for alignment between WIDA ELD standards and state content standards includes the NGESL project.

APPENDIX F

TIER 2 – SUMMARY OF NGESL WORKSHOP EVALUATIONS REVIEWED

Workshop Date	Data Collected
Workshop Feedback from 2016 FacT Training (Year 1)	Handwritten and online workshop evaluations collected from participants who attended three FacT trainings held in Woburn, Northborough, and Falmouth. N=69
Workshop Feedback from 2017 FacT Training (Year 2)	Online survey evaluations collected from participants who attended four FacT trainings held in Brockton, Burlington, Fitchburg, and Holyoke. N=105
Workshop Feedback from 2018 FacT Training (Year 3)	Online survey evaluations collected from participants who attended two FacT trainings held in Holyoke and Greater Boston. N=34
Workshop Feedback from 2019 FacT Training (Year 4)	Online survey evaluations collected from participants who attended three FacT trainings held in Holyoke, Waltham, and “Greater Boston” N=68
Workshop Feedback from 2019 Expeditions training (first year course was offered)	Online survey evaluations collected from participants who attended two Expeditions trainings held in Waltham and Holyoke. N=42
Total number of workshops: 14	
Total number of participant evaluations: 318	

APPENDIX G

TIER 2 – SELECTED “I” AND “NON-I” NCC SURVEY ITEMS RELATED TO THEME 1

The table below reflects selected “I” survey questions from the NCC focusing directly on the Collaboration Tool in relation to Theme 1: Backward Planning for Curriculum and Instruction: Operationalizing the WIDA ELD Standards

Table 2: “I” Statement Survey Questions Pertaining to the Collaboration Tool and Theme 1

Questions about the Tool with “I” statements As a result of using the Collaboration Tool, ...	N	Mean	SD	Responses
12a. ... I have an increased understanding of how to develop goals for high-quality curricular units that address language and content development.	133	4.35	0.81	All
12b. ... I have improved my implementation of the WIDA ELD standards, specifically as related to the simultaneous development of content and language.	133	4.11	0.81	All
12c. ... I have increased the rigor in ESL curriculum development by ensuring that language development is contextualized in grade level key academic practices and standards.	133	4.19	0.87	All
12d. ... I have a better understanding of the NGESL curricular process and its focus on simultaneous development of language and content.	133	4.26	0.89	All

The table below reflects selected “non-I” survey questions from the NCC focusing directly on the Tool in relation to Theme 1: Backward Planning for Curriculum and Instruction: Operationalizing the WIDA ELD Standards

Table 3: Non “I” Statement Survey Questions Pertaining to the Collaboration Tool and Theme 1

Questions about the Tool with non- “I” statements As a result of using the Collaboration Tool, ...	N	Mean	SD	Respondents
15a. ..., participating teachers in my district have a better understanding of the NGESL curricular process and its focus on simultaneous development of language and content.	74	3.55	0.96	Directors/ Coaches
15b. ..., teachers of MCMLs in my district have a greater sense of shared responsibility for ESL instruction	74	3.42	0.92	Directors/ Coaches
15c. ... teachers of MCMLs in my district have greater expertise in ESL curriculum development.	74	3.61	1.01	Directors/ Coaches
15f. ... participating teachers in my district have improved their meaningful implementation of the WIDA ELD standards, specifically as related to the simultaneous development of content and language.	74	3.45	0.92	Directors/ Coaches

All non- “I” statements scored lower than the “I” statement questions. Earlier in this chapter, I discussed my concerns with the validity of “non-I” statements in this survey. Unfortunately, the survey did not ask how familiar directors and coaches were with the Tool, or how much experience they had with it, before asking for their perceived effect of the Tool and its processes on teacher practice. Directors and coaches reporting their perceptions about teachers generally chose somewhere between “neither agree nor disagree” to “agree” in the following areas: as a result of using the Tool, teachers in my district have... a better understanding of the NGESL curricular process and its focus on simultaneous development of language and content; greater expertise in ESL curriculum development; and improved their meaningful implementation of the WIDA ELD standards, specifically as related to the simultaneous development of content and language.

APPENDIX H

TIER 2 – SELECTED “I” AND “NON-I” NCC SURVEY ITEMS RELATED TO THEME 2

The tables below reflect selected “I” and “non-I” survey questions from the NCC survey that focused directly on the Tool in relation to Theme 2: Collaborative Practice for the Simultaneous Development of Content and Language.

Table 4: “I” Statement Survey Questions Pertaining to the Collaboration Tool and Theme 2

Questions about the Tool with “I” statements As a result of using the Collaboration Tool, ...	N	Mean	SD	Responde nts
13e. ... I have an increased interest in collaborating with academic content teachers on curriculum development.	65	4.09	0.97	ESL Teachers
13f. ... I feel better prepared to collaborate with academic content teachers on curriculum development.	65	4.09	0.92	ESL Teachers

Table 5: Non “I” Statement Survey Questions Pertaining to the Collaboration Tool and Theme 2

Questions about the Tool with non- “I” statements As a result of using the Collaboration Tool, ...	N	Mean	SD	Responde nts
15d. ... teachers of MCMLs in my district are better prepared to collaborate on ESL curriculum development.	74	3.49	0.93	Directors/ Coaches
15e. ... teachers of MCMLs in my district have an increased interest in collaborating on curriculum development.	74	3.41	0.94	Directors/ Coaches

APPENDIX I

SUMMARY OF SECONDARY DATA SOURCES AND THEIR RELEVANCE TO THIS
STUDY

Source	Brief Description	Relevance to this study
Report: Next Generation English as a Second Language (NGESL) Project Evaluation Report (NCC, 2019)	The NCC (2019) evaluated the NGESL Project for the MADESE.	The broad NCC report focused on various areas and objectives of the NGESL Project. For my study, I focused on analyzing data that pertained specifically to the Collaboration Tool through the lens of my own research questions.
Survey: Next Generation English as a Second Language (NGESL) Survey (NCC, 2019)	The NCC distributed a survey to 731 educators across the state covering various areas and objectives of the NGESL Project.	The broad NCC survey focused on various areas and objectives of the NGESL Project. For my study, I focused on analyzing data that pertained specifically to the Collaboration Tool through the lens of my own research questions.
Focus Groups: Next Generation English as a Second Language (NGESL) Focus Groups (NCC, 2019)	The NCC ran three focus groups across the state covering various areas and objectives of the NGESL Project.	The NCC focus groups addressed various areas and objectives of the NGESL Project. For my study, I focused on analyzing NCC data that pertained specifically to the Collaboration Tool through the lens of my own research questions.
Report: Evaluation of Implementation of the Next Generation ESL Curriculum Project (Leathers et al., 2019)	Leathers et al. (2019) completed a supervised study that investigated what successful implementation of the NGSEL project looked like in three high schools across the state.	Whereas this report focused on what successful implementation of the entire NGESL project looked like in high school classrooms, I focused on analyzing data that pertained specifically to the Collaboration Tool through the lens of my own research questions.
Interviews: conducted by Leathers et al. (2019) to inform	Leathers et al. (2019) conducted interviews with 13 teachers and 3 administrators to inform	Whereas the interviews focused on what successful implementation of the entire NGESL project looked like in high school classrooms, I focused on

the Evaluation of Implementation of the Next Generation ESL Curriculum Project	their investigation of what successful implementation of the NGSEL project looked like in three high schools across the state.	analyzing data that pertained specifically to the Collaboration Tool through the lens of my own research questions.
Evaluations and reflections: from participants of professional development offerings related to the Collaboration Tool	Handwritten and online evaluations and reflections collected from participants who attended professional development offerings related to the NGESL: 1) NGESL Facilitator Trainings and 2) Expeditions in Collaboration: The Collaboration Tool and Multilingual Learners	Whereas evaluations and reflections addressed various aspects of the professional development offerings, I focused on analyzing data that pertained specifically to the Collaboration Tool through the lens of my own research questions.
Presentation materials	Presentation materials collected from presenters and practitioners around the state that included reference to the Collaboration Tool	Provided additional evidence of use of the Collaboration Tool in districts and among other organizations and individuals
Email communications	A collection of excerpts taken from email communications with various individuals in the field using the Collaboration Tool	Provided additional evidence of use of the Collaboration Tool in districts and among other organizations and individuals

APPENDIX J

SUMMARY OF FOCUS GROUPS AND INTERVIEWS INFORMING THE THREE TIERS OF THIS STUDY

Total number of...	Primary Source (conducted by FMK)	Secondary Source
Focus groups	3	3 (NCC)
Focus group participants	27	20 (NCC)
Individual semi-structured interviews	4 individuals	13 (Leathers et al.)
Unstructured interviews	1 developer, 4 sessions 1 school user, 2 sessions	
Survey responses	54	222 (NCC)

APPENDIX K

INFORMED CONSENT FORM

University of Massachusetts Boston
Department of Leadership in Education
100 Morrissey Boulevard
Boston, MA 02125-3393

Consent Form for: “Educators Bailan with Policy et le Pouvoir in The Educação of Multicultural and Multilingual Students”

Introduction and Contact Information: You are invited to take part in a research study. The researcher is Fernanda Marinho Kray, Ph.D. candidate in the Department of Leadership in Education. This form will tell you about the study, but the researcher will also explain it to you. Please read this form and feel free to ask questions. You can reach Fernanda Marinho Kray any time (Fernandakray@gmail.com / 401-226-7619). You may also reach out to the researcher’s faculty advisor, Dr. Zeena Zakharia (zeena.zakharia@umb.edu).

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

Study Background: At the classroom level, one of the major challenges in educating English Learners (ELs) in American public school systems has been the meaningful operationalization of English Language Development (ELD) standards, and the identification of practical ways for ESL and academic content educators to be able to plan and deliver instruction that addresses the simultaneous development of language and content. Prompted by a request for help from the field, the Massachusetts Department of Elementary and Secondary Education (MADESE) led the field-based, collaborative "Next Generation ESL Project: Model Curriculum Project" (NGESL) in partnership with local practitioners and various organizations. A centerpiece of the NGESL Project was the development of the Collaboration Tool, designed precisely as a response to the challenge of operationalizing ELD standards as expressed through the simultaneous development of language and content.

The **purpose** of this study is to explore how the NGESL and its Collaboration Tool might facilitate the development of standards-based curricular units that intentionally promote language and content development for ELs. This study has the potential to contribute to scholarship, research, and practice on the development and implementation of ELD standards. Study results also have the potential to propel practice, pedagogy, and policy forward to ensure an equitable education for all students, including ELs.

The researcher will primarily gather data through qualitative interviews, focus groups, and document analyses. This will be complemented by the use of short survey questionnaires and analyses of secondary data.

- **Why am I being asked to take part in this research study?** Because you have been involved with or have used the NGESL and its Collaboration Tool.
- **What will I be asked to do?** If you decide to take part in this study, I will ask you to participate in a focus group and/or one individual interview. Both focus groups and interviews will be about your experiences with the processes related to the NGESL and its Collaboration Tool. Following our interviews, I will provide you the transcript of our meetings through email and a summary of my interpretation of your account. You will have the opportunity to share additional information, clarify any areas, and make any suggestions.

I will also ask you to bring samples of standards-based curricular units that were developed using the processes of the NGESL and its Collaboration Tool, or any other documents that are relevant to the discussion. However, it is not required that you bring documents in order to participate.

- **Where will this take place and how much of my time will it take?** Interviews and focus groups will take place at a location and time that are convenient to the participants. Interviews and focus groups may take place at your school, via Zoom, or at another public location that is convenient to participants. Interviews will last approximately 60 minutes. Focus groups will last from 60 to 90 minutes. Interview and focus group discussions will be recorded and transcribed, but your name will never be used in the writing of the study or any subsequent communication.
- **Will there be any risk or discomfort to me?** This study poses minimal risk to participants. The research risk is no greater than the risk ordinarily encountered in daily life or in the performance of routine activities. All participant data will remain confidential. A possible risk is accidental breach of confidentiality. I will do everything I can to protect participant information. Participants may skip any questions they do not feel comfortable answering. Participants may decide to stop participating in the study at any time.
- **Will I benefit by being in this research?** There will be no direct benefit to participants personally for taking part in this study. However, potential benefits of participating in this study include opportunities for educators to engage in in-depth reflection about their practices around standards implementation and the simultaneous development of language and content. Study results have the potential to propel practice, pedagogy, and policy forward to ensure an equitable education for all students, including ELs.

- **Confidentiality: who will see the information about me?** Your part in this research is **confidential**. That is, the information gathered for this project will not be published or presented in a way that would allow anyone to identify you. If you take part in the study, you will select or be assigned a pseudonym that will be used throughout the study to protect your identity. All reports, discussion and presentation associated with the study will utilize the pseudonym and will not include any personal information linked directly to you. Information about your age, gender, race, and educational position will be included to assist others in interpreting the research findings. All interviews will be digitally recorded and transcribed into writing. The researcher will code the written transcripts to identify themes and patterns within interviews and across data sets. All physical documents gathered for this project will be stored in a locked file cabinet, and all electronic files will be stored on a password-protected device. Only the research team will have access to the data. All data will be retained and then destroyed at the end of this study. Your information or samples that are collected as part of this research will not be used or distributed for future research studies, even if all your identifiers are removed.
- **Voluntary Participation – and if I start, can I change my mind and stop participating in this study?** The decision of whether or not to take part in this research study is voluntary. If you do decide to take part in this study, you may end your participation at any time without consequence. If you wish to end your participation, you should directly tell or telephone the researcher. 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 an employee of your school district. If participating, you can refuse to answer any question.
- **Who can I contact if I have questions or concerns?** You have the right to ask questions about this research before you agree to be in this study and at any time during the study. If you have further questions about this research or if you have research-related problem, you can reach Fernanda Marinho Kray at FernandaKray@gmail.com or (401) 226-7619. You can also contact the Faculty Advisor, Dr. Zeena Zakharia at zeena.zakharia@umb.edu.

If you have any questions or concerns about your rights as a research participant, please contact a representative of the Institutional Review Board (IRB), at the University of Massachusetts, Boston, which oversees research involving human participants. The Institutional Review Board may be reached by telephone or e-mail at (617) 287-5374 or at human.subjects@umb.edu.

- **Will I be paid for my participation?** You will not be paid for your participation in the study.
- **Will it cost me anything to participate?** No financial costs will be incurred as a result of your participation in the study. Your time and participation will be all that is required if you chose to participate in the study.

Signatures:

I HAVE READ THE CONSENT FORM. MY QUESTIONS HAVE BEEN ANSWERED.
MY SIGNATURE ON THIS FORM MEANS THAT I CONSENT TO PARTICIPATE IN
THIS STUDY.

Signature of Participant

Date

Signature of Researcher

Printed Name of Participant

Typed/Printed Name of Researcher

APPENDIX L

INFORMED CONSENT TO AUDIO- OR VIDEOTAPING & TRANSCRIPTION

UMASS BOSTON INSTITUTIONAL REVIEW BOARD

CONSENT TO AUDIO- OR VIDEOTAPING & TRANSCRIPTION

Researcher: Fernanda Marinho Kray

Ph.D. candidate in Urban Education, Policy, and Leadership Studies

University of Massachusetts Boston
Department of Leadership in Education
100 Morrissey Boulevard
Boston, MA 02125-3393

STUDY NAME: “Who’s Joining The (Political) Party? Educators Bailan with Policy et le Pouvoir in The Educação of Multicultural and Multilingual Students”

This study involves the audio recording of your discussion with the researcher in an interview or focus group. Neither your name nor any other identifying information will be associated with the audio file or the transcript. Only the researcher team will be able to listen to the files.

The audio files will be transcribed by the researcher and erased once the transcriptions are checked for accuracy. Transcripts of your interview may be reproduced in whole or in part for use in presentations or written products that result from this study. Neither your name nor any other identifying information (such as your voice or picture) will be used in presentations or in written products resulting from the study.

Immediately following the interview, you will be given the opportunity to have the audio files erased if you wish to withdraw your consent to recording or participation in this study.

By signing this form you are consenting to:

- having your interview or focus group recorded;
- to having the file transcribed;
- use of the written transcript in presentations and written products.

By checking the box in front of each item, you are consenting to participate in that procedure.

This consent for recording is effective until the following date: December 2020.
On or before that date, the files will be destroyed.

Participant's Signature _____

Date _____

APPENDIX M

PRE-FOCUS GROUP / INTERVIEW QUESTIONNAIRE

Interviewer/Researcher: Fernanda Marinho Kray

Date: _____

1. In order to maintain confidentiality during the research process, I will unlink any of your personal data, such as your name, from the data and reports. Please choose a pseudonym for this study. How would you like me to refer to you in the study? Choose any pseudonym you'd like.
2. What subject(s) do you currently teach?
3. What grade level(s) do you teach in school?
4. How would you describe your school? (low, mid, high incidence)
5. In what area of the state do you work?
6. What is your teaching experience? What grade levels have you taught, and for how many years?
7. What teaching/administrative license(s) do you hold?
8. How many years have been at your current school/district?
9. When did you first get involved with the NGESL Project, and how?
10. Have you been involved in the following aspects of the NGESL project?
 - a. NGESL Planning Committee? ____ Yes ____ No
 - b. Unit-writing team? ____ Yes ____ No
 - c. Unit-piloting team? ____ Yes ____ No
 - d. Have you completed the NGESL FacT Training? ____ Yes ____ No
 - e. Have you completed the NGESL Expeditions in Collaboration Training?
____ Yes ____ No

f. Have you served as a FacT or Expeditions in Collaboration Facilitator?
_____Yes _____No

APPENDIX N
OUTREACH EMAIL

Subject Line: Invitation to NGESL research focus group and/or interview

Dear (Developer),

I hope all finds you well. As you may already know, I am a doctoral student in the Urban Education, Leadership, and Policy Studies program at UMass Boston. I am conducting a tiered case study for my doctoral thesis focusing on NGESL and its Collaboration Tool, and the ways it may facilitate the simultaneous development of language and content in curricular units. This study has the potential inform the development of future professional learning offerings, the design of new standards and related tools, educator preparation courses, and standards-related policy-making processes. Study results have the potential to propel practice, pedagogy, and policy forward to ensure an equitable education for all students, including ELs.

The primary sources of data for this study are in-depth interviews, focus groups, and document analyses, including materials that educators self-select to demonstrate how they have used the NGESL Collaboration Tool and its processes to simultaneously advance language and content in standards-based curricular units.

You are receiving this notification because you were part of one the NGESL development teams: Planning Committee, Unit Writing, or Unit Piloting. If you choose to participate in this study, you will have one to two meetings with me, either in person or via Zoom. Other correspondence will happen via email so as not to be a burden on your time. You will be invited to a focus group, which will last for about 60-90 minutes. Following the focus group, I may invite a couple of participants for follow-up individual interviews to more deeply explore any issues or particular topics of interest that come up during the focus group. Interviews will last for about 60 minutes. Questions for focus group and interviews will be about your experience with the NGESL Collaboration Tool.

The focus groups and interviews will be audio recorded and transcribed, but your name will never be used in the writing of the study or any subsequent communication. I have also attached the questions that I will ask so you can review them in advance.

Remember that your participation is entirely voluntary and confidential. Please email me at Fernkray@gmail.com or call me at 401-226-7619 if you have any questions or would like to volunteer to participate.

Kind Regards,

Fernanda Marinho Kray
fernkray@gmail.com
(401) 226-7619

APPENDIX O

FOCUS GROUP PROTOCOL

Date: _____

Background information: _____

INTRODUCTION

Part I: Build rapport, describe the NGESL Collaboration study, answer any questions, review and sign IRB protocol and form for recording.

Thank you for participating in today's focus group. You have been selected to speak with me today because you have been involved with the processes related to the NGESL and its Collaboration Tool, and you have indicated that you'd like to volunteer to participate in this study.

My name is Fernanda Marinho Kray. I am a doctoral student at the Urban Education, Leadership, and Policy Studies program at the University of Massachusetts Boston. I am a former English learner, and I also spent 14 years in the classroom teaching English Language Arts (ELA), English as a Second Language (ESL), and Spanish. I have been a lead writer and contributor to state and federal guidance, including in the areas of curriculum, standards, professional development, cultural competence, and equity.

The purpose of this study is to explore how the Massachusetts Next Generation ESL Curriculum Project's Collaboration Tool might facilitate the development of standards-based curricular units that simultaneously advance language and content. This study has the potential to contribute to scholarship, research, and practice on the implementation of English Language Development (ELD) standards.

In order to achieve this goal, I'd like to ask you to be as honest and candid as possible with your responses. There are no right or wrong answers. I am seeking your feedback about your practice, experiences, observations, and opinions about what is helpful about the Collaboration Tool, as well as what is not helpful or what you'd like to see changed for the goal of the simultaneous development of language and content for multilingual learners

Your responses are essential to the success of this study and I want to capture your responses and our conversation completely. I would like permission to record our conversation today. I will also be taking written notes during the focus group interview. I assure you that all responses will be confidential and only a pseudonym will be used to describe you and your

work setting. The recording will be transcribed via transcription software and pseudonyms will be used in the subsequent quotations. I will be the only one who has access to the transcripts and the audio file will be destroyed after it is transcribed.

In order to meet our human subjects requirements at the University of Massachusetts Boston, you must sign this consent form. The form states that: all information will be held confidential, your participation is voluntary, and you may stop at any time if you feel uncomfortable, and we do not intend to inflict any harm. (The participant reviews the form).

I also explicitly ask you as participants not to discuss or attribute what other participants/your colleagues share in this focus group. Please respect the privacy and confidentiality of this focus group and agree/pledge not to share what you hear in this group with others who are not present.

Process

There are no right or wrong answers; we are seeking your feedback about experiences and observations, as well as your opinions, so please be as candid as possible. This is an informal session. My role is to ask questions, listen, take notes, and seek to understand your experience. I want to be sure everyone has a chance to contribute, and I don't expect everyone to agree. I welcome all ideas, opinions and points of view. If you are uncomfortable sharing something or think of something later today or tomorrow that you wish you had shared, please feel free to contact me.

The focus group is scheduled to be around 60-90 minutes. If we are running close to the time, I may need to interrupt to move to another question.

Do you have any questions about the focus group or the study? Anything else before we begin?

APPENDIX P

FOCUS GROUP GUIDING QUESTIONS FOR NGESL DEVELOPERS

1. Why was the Collaboration Tool created?
2. Can you describe the Collaboration Tool?
3. What is the Collaboration Tool intended to do and how?
4. (Tell me more about) How is the Collaboration Tool intended to facilitate processes that intentionally promote language and content development?
5. (Tell me more about) Who is supposed to use the Collaboration Tool and how?
6. How was the Collaboration Tool created? (What was the process?)
7. Why was the Collaboration Tool created this way? (Why was this process chosen and what stands out about it as being helpful to achieve the Collaboration Tool's goals?)

* If you think of something later today or tomorrow that you wish you had shared, or if you are uncomfortable sharing something, please feel free to contact me.

APPENDIX Q

INTERVIEW PROTOCOL (NGESL DEVELOPERS)

Date: _____

Location of Interview: _____

Background information: _____

INTRODUCTION

Part I: Build rapport, describe the NGESL Collaboration study, answer any questions, review and sign IRB protocol and form for recording.

Thank you for participating in today's interview. You have been selected to speak with me today because you have been involved with the processes related to the NGESL and its Collaboration Tool, and you have indicated that you'd like to volunteer to participate in this study.

My name is Fernanda Marinho Kray. I am a doctoral student at the Urban Education, Leadership, and Policy Studies program at the University of Massachusetts Boston. I am a former English learner, and I also spent 14 years in the classroom teaching English Language Arts (ELA), English as a Second Language (ESL), and Spanish. I have been a lead writer and contributor to state and federal guidance, including in the areas of curriculum, standards, professional development, cultural competence, and equity.

The purpose of this study is to explore how the Massachusetts Next Generation ESL Curriculum Project's Collaboration Tool might facilitate the development of standards-based curricular units that simultaneously advance language and content. This study has the potential to contribute to scholarship, research, and practice on the implementation of English Language Development (ELD) standards.

In order to achieve this goal, I'd like to ask you to be as honest and candid as possible with your responses. There are no right or wrong answers. I am seeking your feedback about your practice, experiences, observations, and opinions about what is helpful about the Collaboration Tool, as well as what is not helpful or what you'd like to see changed for the goal of the simultaneous development of language and content for multilingual learners

Your responses are essential to the success of this study and I want to capture your responses and our conversation completely. I would like permission to record our conversation today. I will also be taking written notes during the interview. I assure you that all responses will be

confidential and only a pseudonym will be used to describe you and your work setting. The recording will be transcribed via transcription software and pseudonyms will be used in the subsequent quotations. I will be the only one who has access to the transcripts and the audio file will be destroyed after it is transcribed.

In order to meet our human subjects requirements at the University of Massachusetts Boston, you must sign this consent form. The form states that: all information will be held confidential, your participation is voluntary, and you may stop at any time if you feel uncomfortable, and we do not intend to inflict any harm. (The participant reviews the form).

I also explicitly ask you as participants not to discuss or attribute what other participants/your colleagues share in this interview. Please respect the privacy and confidentiality of this interview and agree/pledge not to share what you hear in this group with others who are not present.

Process

There are no right or wrong answers; we are seeking your feedback about experiences and observations, as well as your opinions, so please be as candid as possible. This is an informal session. My role is to ask questions, listen, take notes, and seek to understand your experience. I want to be sure everyone has a chance to contribute, and I don't expect everyone to agree. I welcome all ideas, opinions and points of view. If you are uncomfortable sharing something or think of something later today or tomorrow that you wish you had shared, please feel free to contact me.

The interview is scheduled to be around 60 minutes. If we are running close to the time, I may need to interrupt to move to another question.

Do you have any questions about the interview or the study? Anything else before we begin?

APPENDIX R

KEY INFORMANT INTERVIEW GUIDING QUESTIONS (NGESL DEVELOPERS)

1. Why was the NGESL Collaboration Tool created?
2. How was the Collaboration Tool created?
3. Can you describe the design and intent of the NGESL Collaboration Tool?
4. Who should use the Collaboration Tool and for what purpose?
 - a. How did you envision that people would use the Collaboration Tool?
5. What kinds of supports and structures are intended to be in place with the use of the Collaboration Tool?
6. Is there something in particular that the Collaboration Tool is NOT intended to do, or a way it is not intended to be used?
 - a. Unintended or creative uses?
7. What would you like to tell me about the design and intent of the Tool that I have not asked?

* If you think of something later today or tomorrow that you wish you had shared please feel free to contact me.

APPENDIX S

INVITATION FOR VOLUNTEERS TO FILL OUT ONLINE SURVEY

QUESTIONNAIRE

Dear MATSOL Conference Attendee,

I am a doctoral student in the Urban Education, Leadership, and Policy Studies program at UMass Boston. I am conducting a tiered case study for my doctoral thesis focusing on NGESL and its Collaboration Tool, and the ways it may facilitate the simultaneous development of language and content in curricular units. The primary sources of data for this study are in-depth interviews, focus groups, and document analyses.

This study has the potential inform the development of future professional learning offerings, the design of new standards and related tools, educator preparation courses, and standards-related policy-making processes. Study results have the potential to propel practice, pedagogy, and policy forward to ensure an equitable education for all students, including ELs.

I am inviting you to fill out a questionnaire about your experience using the Collaboration Tool.

Participation in this study is voluntary and confidential. Your name will never be used in the writing of the study or any subsequent communication.

I am happy to answer any questions you may have about the study and intended procedures.

Thank you for your time!

Kind Regards,
Fernanda Marinho Kray
FernandaKray@gmail.com
(401) 226-7619

APPENDIX T

STATEWIDE SURVEY QUESTIONNAIRE ITEMS

Interviewer/Researcher: Fernanda Marinho Kray

Date: _____

Location of Questionnaire Delivery: I collected emails at the MATSOL Conference. I will send out the link to the email list, ask folks at the state and MATSOL if they'd like to share the survey link with their educators, and post on my social media pages.

Dear Educator,

I am conducting research focusing on the Next Generation ESL Project and its Collaboration Tool, and the ways it may facilitate the simultaneous development of language and content in curricular units. This study has the potential inform the development of future professional learning, the design of new standards and related tools, educator preparation courses, and standards-related policy-making processes.

Your participation is voluntary and confidential.

If you have any questions while taking accessing or taking the survey, you can contact me at Fernkray@gmail.com.

For more information about this study, please visit:

<https://www.dropbox.com/s/cbnv5hnd82xf0mm/Appendix A INFORMED CONSENT Form.pdf?dl=0>

You can access the Collaboration Tool here:

https://wida.wisc.edu/sites/default/files/Website/State%20Pages/Massachusetts/MA_Collaboration_Tool.pdf

Do you voluntarily agree to participate in this questionnaire? If not, please close your browser to exit this questionnaire.

1. Do you use the Collaboration Tool now or have you used it in the past? If not, please close your browser to exit this questionnaire.
2. How do you use the Collaboration Tool?
Consider all of its sections: the blue column's connection to key academic practices and/or standards, the green column's macro and micro language functions, the yellow

summary of performance definitions, and the space to help you design Focus Language Goals (FLGs). Consider also how you use page 2's thinking space.

3. Why do you use the Collaboration Tool?
4. Does the Collaboration Tool support you in designing instruction that simultaneously develops content and language? If so, how?
5. Are there any parts of the Collaboration Tool that you think are NOT helpful to help you design curriculum and instruction for the simultaneous teaching of content and language? Please select your chosen items and explain why in the "other" option below.

- The blue column: Connection to Key Academic Practices and or/Standards
- The dark green column: Macro Functions (WIDA's Key Uses of Academic Language)
- The light green column: Micro Functions and their link to sample progressions
- The yellow row: summary of WIDA's performance definitions
- Thinking Space 1: suggestions to develop Focus Language Goals (FLGs)
- Page 2, Thinking Space 2: Language as Action and Contingent Feedback
- Other...

6. What are the most helpful parts of the Collaboration Tool to help you design instruction for the simultaneous teaching of content and language? Please select your chosen items and explain why in the "other" option below.

- The blue column: Connection to Key Academic Practices and or/Standards
- The dark green column: Macro Functions (WIDA's Key Uses of Academic Language)
- The light green column: Micro Functions and their link to sample progressions
- The yellow row: summary of WIDA's performance definitions
- Thinking Space 1: suggestions to develop Focus Language Goals (FLGs)
- Page 2, Thinking Space 2: Language as Action and Contingent Feedback
- Other...

7. Is there anything else you'd like to share about the Collaboration Tool that I have not asked?

APPENDIX U

OUTREACH EMAIL TO PRINCIPAL

Subject Line: Request for permission to conduct a case study in your school

Dear Principal X,

My name is Fernanda Marinho Kray. I am a doctoral student in the Urban Education, Leadership, and Policy Studies program at the University of Massachusetts Boston.

As you know, I am conducting a case study for my doctoral thesis focusing on Next Generation ESL Curriculum Project and its Collaboration Tool, and the ways it may facilitate the simultaneous development of language and content in curricular units. I would like to include educators from your school as research participants, as they are a group who have been deeply involved in the project from its inception.

This study has the potential inform the development of future professional learning offerings, the design of new standards and related tools, educator preparation courses, and standards-related policy-making processes. Study results also have the potential to propel practice, pedagogy, and policy forward to ensure an equitable education for all students, including ELs.

The primary sources of data for this study are in-depth interviews, focus groups, and document analyses, including materials that educators self-select to demonstrate how they have used the NGESL Collaboration Tool and its processes to simultaneously advance language and content in standards-based curricular units.

I truly appreciate your openness to discuss this study. Please let me know if I have permission to conduct the study in your school. If permission is granted, I will need a letter stating that I have been granted permission to conduct the doctoral study in your district (or a copy of the email with your approval). I will then follow up with recruitment of the ELE director, the curriculum integration coach, three ESL teachers, and three to five content teachers who collaborate with the ESL teachers. Participation in this study is voluntary and participant's part in this research is confidential.

I look forward to hearing from you and would be happy to answer any questions you may have about the study and intended procedures.

Kind Regards,
Fernanda Marinho Kray
FernandaKray@gmail.com
(401) 226-7619

APPENDIX V

FOLLOW UP RECRUITMENT EMAIL – FOCUS GROUP

Subject Line: NGESL Collaboration Tool Study

Dear (Education Actor)

Thank you for your interest in the NGESL Collaboration Tool research study. I look forward to meeting you to learn about your experience with NGESL and its Collaboration Tool.

Based on your response to my initial email, I will plan on our initial meeting taking place on X.

Again, at this time you will select a pseudonym to protect your identity, or I can assign you one. We will go over the informed consent form that you must sign in order to participate in the study. You can ask me any questions you may have about the study.

Then, I will conduct a focus group of about 60-90 minutes. The focus group will be audio recorded and transcribed into writing. I have again attached the questions that I will ask so you can review them in advance.

Following our focus group, through email, I will provide you the transcript of discussion and a summary of my interpretation of the group's account. You will have the opportunity to share additional information, clarify any areas, and offer any additional suggestions. Again, I appreciate your participation in the study. If you have any questions or need to reschedule our initial meeting, please do not hesitate to contact me. Please email me if you have any questions.

Kind Regards,

Fernanda Marinho Kray
FernandaKray@gmail.com
(401) 226-7619

APPENDIX W

FOLLOW UP RECRUITMENT EMAIL – INTERVIEW

Subject Line: NGESL Collaboration Tool Study

Dear (Education Actor)

Thank you for your interest in the NGESL Collaboration Tool research study. I look forward to meeting you to learn about your experience with NGESL and its Collaboration Tool.

Based on your response to my initial email, I will plan on our initial meeting taking place on X.

Again, at this time you will select a pseudonym to protect your identity, or I can assign you one, and we will go over the informed consent form that you must sign in order to participate in the study. You can ask me any questions you may have about the study.

Then, I will conduct an approximately 60-minute individual interview session. The interview will be audio recorded and transcribed into writing. I have again attached the questions that I will ask so you can review them in advance.

Following our interview, through email, I will provide you the transcript of our in-depth interview and a summary of my interpretation of your account. You will have the opportunity to share additional information, clarify any areas, and offer any additional suggestions. Again, I appreciate your participation in the study. If you have any questions or need to reschedule our initial meeting, please do not hesitate to contact me. Please email me if you have any questions.

Kind Regards,

Fernanda Marinho Kray
FernandaKray@gmail.com
(401) 226-7619

APPENDIX X

RELATIONSHIPS AND CONVERGENCES

Relationships and Convergences among the mathematics, science, and ELA practices (Cheuk, 2012).

Relationships and Convergences

Found in:

1. CCSS for Mathematics (practices)
- 2a. CCSS for ELA & Literacy (student capacity)
- 2b. ELPD Framework (ELA "practices")
3. NGSS (science and engineering practices)

Notes:

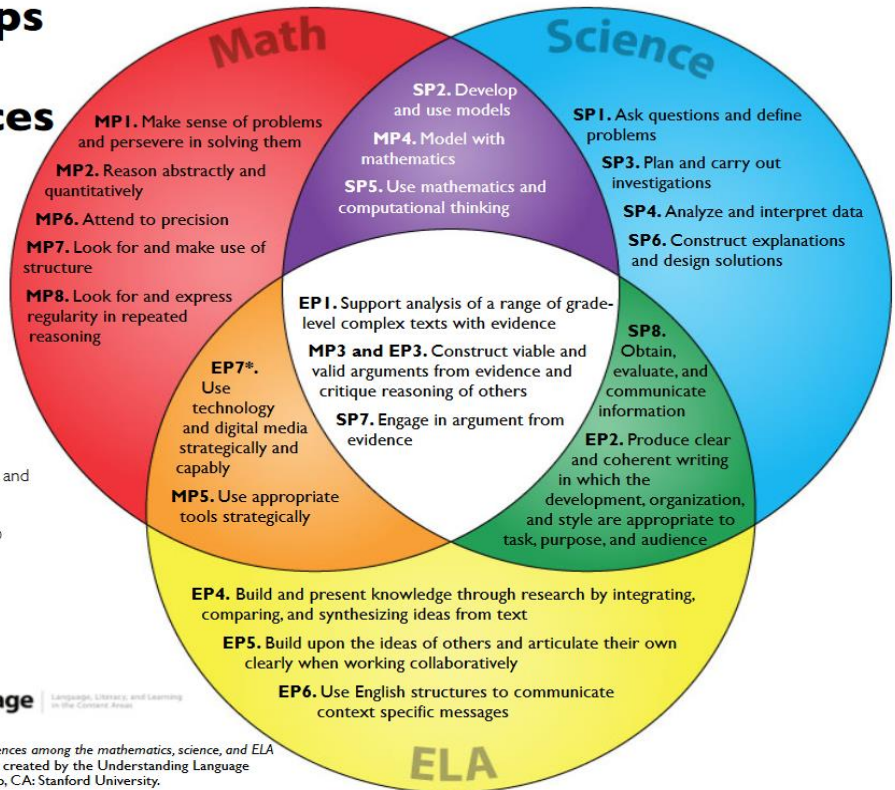
1. MP1–MP8 represent CCSS Mathematical Practices (p. 6–8).
2. SP1–SP8 represent NGSS Science and Engineering Practices.
3. EP1–EP6 represent CCSS for ELA "Practices" as defined by the ELPD Framework (p. 11).
4. EP7* represents CCSS for ELA student "capacity" (p. 7).

Stanford
GRADUATE SCHOOL OF
EDUCATION

Understanding Language Language, Literacy, and Learning
in the Content Areas

Suggested citation:

Cheuk, T. (2013). *Relationships and convergences among the mathematics, science, and ELA practices*. Refined version of diagram created by the Understanding Language Initiative for ELP Standards. Palo Alto, CA: Stanford University.



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