Commercially Produced Literacy Packages:
Why Do Schools Use Them?

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Abstract

The genesis of this study was anecdotal reports that Dunedin primary schools were using commercially produced packages to teach literacy. In wanting to understand this phenomenon, the study sought to find if the purchase of such packages was widespread and investigated reasons for their usage.

All 42 Dunedin primary school principals completed a questionnaire and eight principals, four in schools with packages and four leading schools without a package, participated in an interview.

Findings showed that package usage is widespread with 62% of Dunedin primary schools using one or more packages. The predominant reason for using a commercially produced package was to teach phonics. Principals also used packages to ensure consistency in school-wide understandings and practices; to meet school literacy targets; as a partial solution to the intensification of teachers’ workloads; and to increase teachers’ pedagogical content knowledge in writing, spelling and comprehension. There were clear differences in the beliefs and practices between principals of schools using packages and those in schools not using them concerning the teaching of phonics, the professional development of their teachers and responses to intensification and accountability demands. Impacting on principals’ decisions to purchase and use a teaching package was the long-lived, public debate on the place of phonics in the teaching of reading, and also, the neo-liberal school reform policies that increased principal autonomy and responsibility while simultaneously tightening school accountability requirements.
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Chapter One: The Research Topic and Context

This study investigates a reported but unsubstantiated change in the way Dunedin primary schools teach literacy (Hughes, 2009). It is the use of commercially produced literacy packages that prescribe what teachers do to teach aspects of reading and writing.

What are commercially produced packages? Packages share four definitive features. They are a commercial product, prescriptive, detail the pedagogy, and have a timeline for teaching objectives that the package’s producer considers necessary in the teaching of reading and writing (Shannon, 1987). In addition, packages typically include a teacher’s manual or guidebook, teaching resources (e.g., books, charts and flashcards) and workbooks for students. In short, packages include readymade resources for students and teachers and specify what content to teach, when to teach, and how to teach.

If indeed Dunedin schools are using a commercially produced literacy package, then it would seem to be a fundamental change in the way teachers teach literacy. For some three decades teachers – taking account of the identified learning needs of their students, the availability of resources and their repertoire of teaching strategies – made decisions about what they would teach their students, the resources they would use, the teaching strategies they would implement and the time they would spend on teaching (Elley, 2004; Phillips, McNaughton & MacDonald, 2004; Smith & Elley, 1997). If packages are being used, then it is the planning and prescriptions of a person or persons external to the classroom, that shape the teaching and literacy learning of Dunedin students.

Thus, this study seeks to answer the following questions:

1. How widespread is the use of commercially prepared literacy packages in Dunedin primary schools?

2. Why do schools choose to use a commercially produced literacy package to teach part of their literacy programme?

This chapter comprises four sections. The first section discusses the origins of commercially produced packages, the paucity of New Zealand research on these packages, and describes four packages currently in use in Dunedin primary schools. In the second section I position
myself as researcher. The third section describes Dunedin, the setting for the study, and the fourth provides an overview of the remainder of the thesis.

**Commercially Produced Teaching Packages**

The origins of commercially produced teaching packages.

Literacy packages share their commercial origins with the highly successful and widely used basal readers, a much earlier innovation, and one which for almost seventy-five years shaped the reading instruction of American schools. Basal readers date back to the middle of the twentieth century when, in the United States of America, the application of behavioural psychology to reading became a powerful influence in the development of standardised literacy curricula (de Castell & Luke, 1989). For example, having lists of words that occurred frequently in texts, and knowing about the effects on students of such factors as the vocabulary of the textbook, the text type, and its syntactic complexity meant that this new knowledge could be used to scientifically design children’s text books (de Castell & Luke, 1989, p. 79). The prevailing belief was that by applying this new knowledge about reading and learning, “children’s readers could be designed scientifically to be more ‘readable’, more developmentally appropriate and thereby, it was presumed, more effective” (de Castell & Luke, 1989, p. 79). A call for standardised reading material to be more comprehensive came when the first wave of post war “baby boomers” entered American schools and there was a shortage of qualified teachers. The rapid commercial development and highly successful marketing of what became known as basal readers was the major expression of this scientific movement.

Basal readers comprised a series of books for children to read, workbooks for children, and a teachers’ manual that detailed the scope and sequence of lessons and prescribed the pedagogy (Chall, 1967). The production and sale of basal readers became a multi million dollar business and by 1964 it was estimated that between 92 and 98 per cent of U.S. primary teachers were using them for literacy instruction (Jenkins & Pany, cited in de Castell & Luke, 1989). The firmly held conviction that a scientific-based approach to literacy instruction was fool-proof quickly spread to other countries, and Canada, Great Britain, Australia, and New Zealand all began using adapted versions of American basal readers (de Castell & Luke, 1989; Soler, 2000). For example, the Janet and John readers used in New Zealand schools from 1950 to 1963 were an adaption of the American Alice and Jerry basal series (Price, 2000).
A subsequent, similar and more recent expression of the scientific development is the commercial reading package. Like the basal reader, the commercially produced package is developed externally to the school, is a business venture, includes pedagogy and resources, and is often marketed with references to research and “the ability to deliver, of itself, learning gains in genuine, purposeful, real-world reading” (Freebody, 2000). However, whereas the basal reader with all its components was the total reading programme (Chall, 1967), most commercially produced literacy packages focus on a discrete aspect of reading or writing such as mastery of phonics, letter formation, and spelling (Freebody, 2000).

Commercially produced packages became known variously as “prepackaged commercial curriculum” (Apple & Jungck, 1992, p. 29), the “packaged curriculum” (de Castell & Luke, p. 85), “commercial early-literacy packages” (Freebody, 2000) and “commercial reading materials” (Shannon, 1987, p. 307). The term “commercial materials” is preferred by Shannon (1987) because it includes the “plethora of other workbooks, worksheets, or kits that students are asked to complete daily” (p. 308). Shannon (1987) argues “It is the commercial production of these materials that gives school personnel the mistaken notion that the materials can teach students to read” (p. 308). He notes commercial materials are promoted using a range of marketing strategies including persuasive product endorsement claims such as “developed by reading experts”, “objective, tightly structured, and logically ordered”, and “with sufficient repetition to insure mastery” (Shannon, 1987, p. 310). According to Shannon (1987), standardising reading materials, perceived to be an improvement over the teachers’ subjectivity (i.e., a non-scientific approach to the teaching of literacy), and bringing scientific instruction to all students, are prime reasons for the popularity of commercial reading materials.

**Commercially produced literacy packages in New Zealand.**

Given that commercially produced literacy packages are a new phenomenon in New Zealand primary schools, there is a paucity of research with just two studies investigating aspects of package usage. One study, “An evaluation of the use and integration of readymade commercial literacy packages into classroom programmes” was commissioned by the Ministry of Education and undertaken by Parr, Aikman, Irving, & Glasswell (2004). It investigated how teachers incorporated a literacy package, selected from a list of five and given free of charge, into their existing classroom programmes. It explored how teachers evaluated their package, and how their use of the package changed over the two year duration
of the study. The researchers also identified examples of “best practice” in the introduction and use of such packages (Parr et al., 2004).

The second study was less extensive than that of Parr et al.’s (2004) and was conducted by Keith Williamson. Williamson (2007), a primary school principal reporting on his sabbatical study, visited 18 schools to “investigate the use, capacity and infrastructure of schools’ spelling curriculum plans as inherent in the development of literacy” (p.1). With his prepared questions to principals he sought information about each school’s spelling programme, how it was developed, what resources were used and how it was evaluated. Although he listed the percentages of schools using what he called “a commercially produced programme” (Questions and responses section, para. 11) he did not define what he meant by that descriptor or differentiate between a programme and a resource. Thus, Williamson’s informal study and the research conducted by Parr et al. (2004) differ from my study in both their research questions and methodology. Further, neither study sought to investigate why schools choose to use a commercially produced literacy package.

Examples of commercially produced literacy packages.

Four commercially produced packages used in Dunedin schools are described below. Two packages, Jolly Phonics and Letterland, were designed to teach phonics. The others, Sounds Alive and Words Alive, were developed as spelling and writing programmes respectively.

Jolly Phonics.

*Jolly Phonics,* a package produced in England and published by Jolly Learning Ltd, was first produced commercially in 1992 (See appendix F). The overall aim of the package is to use a synthetic method of teaching phonics to help children read and write (Lloyd, S., 2005). In other words, the method of teaching involves converting letters into sounds and then blending the sounds together to decode a written word. The package comprises a handbook for teachers, *The Phonics Handbook,* with detailed instructions on when to teach sounds, how to teach them, and how much time to allow for lessons; a wall frieze; an alphabet chart; flash cards; and big books that illustrate the story associated with each sound (Lloyd, S., 2005). A DVD provides directions for teachers and a pamphlet gives further information about the package. In addition, software for use with an interactive whiteboard, teachers’ notes, a CD Rom, worksheets, games, puppets, instructional readers, jingles, and songs are available for purchase.
In the handbook for teachers (Lloyd, S., 2005), specific instructions are given for teaching three reading skills, namely, learning the 42 “sounds” of the English language, blending sounds to form words and identifying sounds in words; and two writing skills, how to form letters and how to spell tricky words (i.e., words with irregular spelling). The handbook details a prescriptive programme for teaching letter sounds in the first eight or nine weeks at the rate of six letters per week. For example, in week one, students learn s, a t, i, p, and n. According to S. Lloyd (2005), students can cope with learning six letters a week. The order of the letters has been made with the intention of separating any letters that might cause confusion (e.g., b and d) and to include letters that could be used to make words (e.g., in week one students could make the words pat, pan, sit, and pit).

There are four parts to each lesson, namely, (i) a brief illustrated story that introduces the sound of the letter and an associated action to help students remember the letter that represents the sound, (ii) a demonstration of blending letters together (e.g., t-a-n, tan), (iii) students are shown the letter on a flash card and are given instructions on how to form the letter correctly, and (iv) students are shown the letter and a picture on a wall frieze (Lloyd, S., 2005). Thus, each lesson includes sound, action, and visual information.

S. Lloyd (2005) recommends that during the first nine weeks students are not given books to read as part of an instructional reading programme. The purpose for delaying reading from books is to teach students that “there is a code to reading and that most words can be worked out” (p. 16).

The package does not include material to assist the teacher assess students’ progress.

**Letterland.**

Like *Jolly Phonics, Letterland* is an English package that also uses a synthetic method of teaching phonics (See appendix F). It was created in 1968 by Lyn Weedon with the aim of teaching phonics and letter formation to children aged three to eight years (Freese, 2003). Materials were updated in 2003 when new teaching strategies and products were added to the package (Letterland New Zealand, 2012).

The handbook, *Letterland Teacher’s Guide* (Freese, 2003), provides specific details for teaching 44 letter sounds, word building, onsets and rimes, beginnings, middles and endings of words, consonant blends, digraphs and trigraphs, and includes assessment outcomes (pp. 7-
Additionally, the handbook details teaching resources, take-home reading and spelling lists, games, and songs. The *Letterland* package comprises the *Letterland ABC Book*, vocabulary cards, a wall frieze, alphabet songs, and a reading booklet (Freese, 2003). Blends and digraph songs and copymasters are recommended for purchase along with *Letterland* software.

A feature of *Letterland* is the use of pictogram characters designed to “carry information about each letter’s shape and sound” (Freese, 2003, p. 11). The pictograms are visual images of a character entwined within the associated letter to assist students to link sounds to letters. Students are also taught songs about each letter.

**Sounds Alive and Words Alive packages.**

According to information on the website righttoread.co.nz both *Sounds Alive* and *Words Alive* were developed in 2001 by Kate Lloyd, a New Zealand teacher. (Note: This website was available in 2010 but is now no longer able to accessed.) Lloyd suggested that *Sounds Alive* is best implemented as a spelling programme for the whole school or for Years 0 – 4, and that *Words Alive* is a school-wide writing programme. Although schools can choose to use either programme, the practice in many schools is to use both with *Sounds Alive* usually preceding *Words Alive*.

**Sounds Alive.**

The handbook for teachers, *Right to Read Sounds Alive: A sight and sound spelling programme*, (Right to Read, 2007) details a specific sequence for teaching combinations of consonants and short vowels, then digraphs and long vowels, and finally multisyllabic words. For example, the programme is divided into sections called Plans, with Plan One specifying teaching the sounds associated with the following consonants and short vowels, a, c/k, f, o, i, m, p, s, t, and d, as well as the skills of separating and blending (Plan One, p. 2, Right to Read, 2007). When students can blend and separate individual phonemes they learn how to “chunk them together, to speed up recording” (p. 1). For example, when students “know ‘am’ they should be able to hear it as a chunk in the words Sam, tramp camp” (p. 1).

Included in the package are assessment activities to identify a student’s knowledge of letters and the associated sounds as well as the student’s ability to blend and separate sounds in words, substitute letters, and identify syllables in multisyllabic words (Right to Read, 2007).
Further, the handbook has daily teaching plans, examples of homework sheets, guides for parents, and student learning resources.

**Words Alive.**

*Words Alive* is an intensive six-week writing programme that is repeated twice a year and implemented daily for at least four days a week (Lloyd, K., & Lovelock, 2009). Key features of the programme include teachers modelling aspects of the craft of writing, regular monitoring of student progress, teachers giving students feedback, frequent opportunities for students to practise and apply new knowledge and skills, and professional development for teachers (Lloyd, K., & Lovelock, 2009). The professional development initially includes learning about the structure of the programme, the purpose and organisation of the daily lesson, group conferencing, monitoring progress, and management of the programme. The next phase focuses on increasing teachers’ grammatical knowledge including parts of speech, language features, and sentence development. The third phase is about the assessment of student’s writing.

**Marketing strategies.**

As noted earlier, Shannon (1987) reported that developers of commercially produced packages use various marketing strategies to sell their product. That is the case with the four commercially produced literacy packages discussed above. The website, righttoread.co.nz, that previously informed readers about *Sounds Alive* and *Words Alive*, included brief testimonials from teachers. Both *Letterland* and *Jolly Phonics* use references to research and researchers to attract prospective buyers. In the *Jolly Phonics Catalogue* (Jolly Learning Ltd, 2008) the claim is made that “research shows that the progress made by children using *Jolly Phonics* far exceeds that of children not taught using a synthetic phonics approach” (p. 2). The *Jolly Phonics* website includes details about research in Canada and England comparing the effects of *Jolly Phonics* with that of whole language methods, and research in Scotland comparing three different methods of teaching phonics (jollylearning.co.uk/). The reported research found that students using *Jolly Phonics* performed at a higher level on word reading, spelling, and nonword reading tests than students in whole language classrooms, and that children who were taught using a synthetic phonics method (i.e., the teaching method used by *Jolly Phonics*) were spelling at a level higher than the participants who used other methods.
Product endorsement is also used as a marketing strategy to sell packages. For example, the Letterland website (Letterland, 2011) cites Felton, a reading consultant and researcher:

Letterland, with its engaging characters, stories, songs, gestures for each letter, provides a rich and effective system of cues for letter-sound associations. Use of these multiple cues as part of the Letterland reading program should ensure that all students develop mastery in this critical component of reading.

Similarly, Weedon (2003), creator of Letterland, states in the Foreword to the Teacher’s Guide: “I am delighted to welcome this latest edition which delivers the aims of the National Literacy Strategy and current UK government guidelines following the Rose Report” (p. 6, Freese, 2003), thereby suggesting that by using Letterland, schools will fulfil their legal requirements in the teaching of phonics. In summary, marketing strategies used by package producers include (i) testimonials from teachers, academics, and renowned educators about the product, (ii) information about research into the different methods of phonics instruction, and, (iii) statements that make links between the use of a package and new education policy.

**Positioning Myself As Researcher**

I am a New Zealand trained primary teacher who studied at what was then the Dunedin Teachers College. In my ensuing teaching career I was a primary school teacher, a principal of a Dunedin primary school, a professional practice fellow at first the Dunedin College of Education and later at the University of Otago College of Education. For six years I was a literacy consultant working in New York City and Harrisburg City schools. For the past three years I have been teaching new entrants in a rural Otago school.

Cohen, Manion and Morrison (2007) argue that “Researchers should acknowledge and disclose their own selves in the research, seeking to understand their part in, or influence on, the research” (p. 171). What then is my position on the focus of this study? Its genesis was the convergence of two career-related events. The first was my return to New Zealand after a period of six years supporting schools in New York City and Pennsylvania as they changed from whole class teaching using basal readers to adopting a balanced literacy approach to the teaching of reading and writing. The second was anecdotal reports that some Dunedin schools were using commercially produced literacy packages. Given that six years earlier, in the period 1995-1999 when I was a Dunedin primary school principal, there was no principal professional discussion then about commercially produced packages for teaching literacy, nor
was I aware of any Dunedin school using one, my curiosity was instantly piqued. Why were teachers using a package developed by a person or people external to the school and with no knowledge of the students? It was from this position of intense curiosity that I planned and conducted this research. Firstly, I wanted to know whether indeed literacy packages were being used in Dunedin schools and, if so, how widespread was this new practice. And secondly, what were principals’ reasons for purchasing a commercially produced package? My study therefore aimed to privilege the perspectives of principals as pedagogical leaders and to “illuminate the subjective meaning, actions and context of those being studied” (Fossey, Harvey, McDermott & Davidson, 2002, p. 723).

**Dunedin and its Schools**

The city of Dunedin, the setting for this study, has a long history of valuing education and teacher professionalism. This commitment to providing quality education based on the Scottish model of schooling resulted in a number of significant “firsts”. For example, the first official school master to the Dunedin settlement, James Blackie, gave lessons to young Scottish immigrants on the voyage to New Zealand and taught at Otago’s first primary school in 1848 (Ewing, 1960). Eleven years later, in 1861, New Zealand’s first university, the University of Otago, was founded (University of Otago, 2012). It was the first university in New Zealand to admit women to classes. In 1876 the first New Zealand teacher training institution, Dunedin Training College, was established and included what was then called a Practising School, later renamed Normal School (Johnston & Morton, 1976). The Normal School gave the College students an opportunity to experience a model rural classroom with pupils of mixed ages (Keen, 2001). Ten years later New Zealand’s first Associated Schools were created to allow student teachers to plan and teach in a Dunedin school setting (Johnston & Morton, 1976). The term Associated Schools, was later abandoned and now many Dunedin schools have associate teachers who provide support and guidance to student teachers in their classrooms. Dunedin continues to be a centre for teacher preparation and teacher education.

Dunedin is the largest city in New Zealand by area (Dunedin, New Zealand, 2012) and its schools provide education for inner city, suburban, and rural communities. The city’s 76 schools comprise 33 contributing primary schools, 24 full primary, three intermediate, one composite, and eleven secondary schools (Education Counts 2011). Given Dunedin’s large geographical area and its relatively small population of 118,600 (Statistics New Zealand, 2012), most Dunedin primary schools are small. Of the 58 Dunedin composite, contributing,
and full primary schools, 22 per cent have fewer than 50 students, 24 per cent have between 51 and 100 students, 17 per cent have between 101 and 150 students, 28 per cent have between 151 and 300 and just 9 per cent have a student roll of more than 300 (Education Counts, 2011).

All schools in New Zealand are given a decile rating ranging from one (the lowest decile rating) to ten (the highest) based on the socio-economic backgrounds of the families of the students attending the school. Using this measure, 55 per cent of Dunedin primary school communities are considered high socio-economic (i.e., deciles 8-10), 35 per cent are medium socio-economic communities (i.e., deciles 4-7), and just 10 per cent are low socio-economic communities (i.e., deciles 1-3) (Education Counts, 2011).

In recent years, government education policy has been to either close or merge two or more small schools. This has resulted in a reduction in the total number of Dunedin schools with five schools being closed since 2008 because of roll decline and seven involved in mergers (Lewis, 2010, 2012).

The Organisation of the Thesis

Chapter Two, a review of the literature, examines four broad and overlapping areas of inquiry that continue to impact on schools’ decisions about the teaching of literacy. They are the intensification of teachers’ work; the New Zealand neo-liberal education policies and reforms; the long-lived, politicised, public debate about the place of phonics in the teaching of reading; and the on-going professional development and learning of teachers.

Chapter Three, methodology, explains how the study was conducted, describes the participants and their selection, the ethical issues and measures undertaken to protect the participants’ confidentiality, the development of the data collection tools, and the analysis of the data.

Chapter Four analyses and discusses the findings in relation to the two research questions.

Chapter Five provides a summary of the data and conclusions. In addition, it raises further questions for inquiry about the use of commercially produced packages in New Zealand primary schools.
Chapter Two: Literature Review

Introduction

Commencing with Apple’s (1986) seminal study of teacher workforce and curriculum issues, this literature review examines significant studies from the period 1986 to the present day that inform and support inquiry to answer the two research questions:

1. How widespread is the use of commercially produced literacy packages in Dunedin primary schools?

2. Why do schools choose to use commercially produced packages for the teaching of literacy?

Apple (1986, 1995, 1996, 2001, 2007), an American researcher, studied labour workplace phenomena as they operate within school systems. Looking through multiple lenses, socio-political, economic, and cultural, he focused on varied factors such as control of the teaching workforce and politicisation of curriculum processes. His thinking, his analyses, and his writings on the impact of macro factors (e.g., social change, technological advances, changing economic and political perspectives, the marketisation of education, and the emphasis on accountability) on the nature of what happens in schools, how schools are managed, and how teachers teach, provided fertile ground for educational researchers to delve further into the work of schools and the lives of teachers. Apple’s thesis, conceived almost three decades ago, might, in part, provide insights and explanations as to why, in the second decade of the 21st century, New Zealand primary schools are possibly making fundamental changes to their literacy teaching.

This chapter has four sections. The first section focuses on neo-liberalism and managerialism, movements that Apple (2004) states are “aggressively – altering our jobs and our schools” (p. 14) and analyses the impact of the 1989 radical neo-liberal reforms of the governance, management, and administration of New Zealand schools. It discusses New Zealand schools becoming self-managing and more accountable to their local communities and to the government of the day than in the past, and the marketisation of schools. It also examines significant and ongoing changes to the New Zealand school curriculum post 1989 and the impact of constant demands by external bodies over two decades for more and more
school assessment data. Could it be that the use of commercially produced packages enables schools to satisfy the external demands for increasing amounts of assessment data?

The second reports and discusses Apple’s research examining studies on three key research strands that emanated from his work, namely, the intensification of teachers’ work, the professionalisation of teachers, and the impact of these issues on teachers’ work and lives. As teachers struggle to cope with intensification it may be that some schools have decided to purchase a commercially produced package as a possible solution to complex workload issues.

Section three discusses what is a long-lived and, at times fierce, ongoing, highly politicised international public debate sometimes known as the “Reading Wars” in which, for over half a century, researchers, educators, politicians, and members of the public have argued about the place of phonics in the teaching of reading and, in New Zealand, the cause of the large disparity between good and poor readers. Might it be that schools, influenced by the back-and-forth reading debate, have decided to purchase and use commercially produced packages for the teaching of phonics?

The last section examines the many and diverse ways that teachers learn, and explores the context and content of effective professional development and learning of teachers. Commercially produced packages include content knowledge for teachers, pedagogical details and, in some cases, a structured professional development component. The question arises, might it be that these professional learning features are, in part, the reason why some schools purchase a teaching package?

Although the literature relating to the above studies is examined as four discrete areas of research and inquiry, the interplay of policies and events, both beyond schools and within schools, is immensely complex and dynamic. Figure 1 presents this scenario. It positions the overarching ideologies, policies and reforms and endeavours to show the invariably dynamic, multitudinous and ongoing interactions between them, and the likely implications for what happens in schools in terms of literacy learning.
Section 1: The New Zealand Neo-liberal Education Reforms

Three decades of persistent, pervasive and extensive nationwide school reform would seem to have created fertile ground for greatly increased school-based curriculum decision-making and the adoption of changed teaching practices. Given that the use of commercially produced literacy teaching packages is a recent phenomenon and, that as a consequence of the first wave of education reforms known as Tomorrow’s Schools, New Zealand communities were given control of their local schools and of curriculum delivery (Lange, 1988), an examination of the literature relating to what ensued from this reform is warranted.

Driving the reforms were the ideological forces of neo-liberalism: these are discussed and defined in this section. I examine the effects of the decentralisation of the education system, the transfer of responsibility for each school from the state to its elected board of trustees, the
demands made of schools to be directly accountable to their community, the emphasis on the business-like management of schools, and the culture of market competition and parental choice. I also discuss a second wave of education reforms that focused on curriculum changes and the assessment of students’ learning and, finally, I identify and examine a third wave of neo-liberal education policies that continue to impact on New Zealand teachers and schools at the present time.

**Background to the reforms.**

By the 1980s, events beyond New Zealand’s control had exerted a dramatic effect on the country’s economy (Fiske & Ladd, 2000). The loss of guaranteed trading rights after Britain joined the Common Market and the oil shocks of 1973 and 1979 resulted in a rise in inflation and unemployment. With a sense of urgency, in 1984 the new first term Labour Government led by Prime Minister Right Honourable David Lange began radical restructuring of the New Zealand economy, removing controls, reducing tariffs and “restructuring major institutions along free market lines” (Fiske & Ladd, 2000, p. 28).

Following the government’s focus on economic reforms in their first term (1984 - 1987), attention shifted to education (Codd, 2005). Treasury officials and senior cabinet ministers argued that reform of the education system should be included as part of the overall restructuring of the New Zealand economy (New Zealand Treasury, 1987).

**Neoliberalism and the education reforms.**

The Treasury Brief (New Zealand Treasury, 1987) for the incoming second term Labour Government, with its critique of the entire education system, laid the foundations for education reforms based on neo-liberal ideologies (O’Neill et al., 2004). What were radical recommendations for change rested on three arguments. One, Treasury (New Zealand Treasury, 1987), argued that education cannot be considered a “public good” (p.32) and that “educational services are like any other goods traded in the market place” (p. 33). Treasury officials asserted that education was consuming the nation’s resources and keeping taxes high, and that those who benefitted were mostly education recipients, not the nation as a whole. Although the amount of expenditure on education was “very large and still increasing” (New Zealand Treasury, 1987, p. 18), the education system was not, according to officials, performing well. In short, their recommendation for education change was based on the belief
that the marketisation of education would improve delivery of services (New Zealand Treasury, 1987).

Treasury’s notion that education is not a public good is, according to Apple (2001), consistent with neo-liberalism. Neo-liberals perceive education as a “black hole” into which money is poured without worthwhile gains for the whole of society, and their belief that what is needed is “efficiency and an ‘ethic’ of cost-benefit analysis” (Apple, 2001, p. 38). They assume that in a competitive market environment schools will become more efficient, and at a time of international competition, produce “a labour force that is sufficiently skilled, adaptable and flexible” (Apple, 2004, p. 11).

Treasury’s second argument advanced the decentralisation of educational administration, maintaining that decisions could be made more efficiently at the local level (New Zealand Treasury, 1987). The existing centralised system of schooling dated back to the Education Act of 1877, the beginning of a national education system. The educational structures of regional governance (i.e., the 10 Education Boards) and central regulation by the government’s Department of Education, instituted in part to provide fairness and equality of opportunity, were described by Treasury as being limited in terms of their roles and their flexibility and consequently lacking in ability to provide a rigorous accountability system. Furthermore, Treasury argued that in order to address the inequalities in the present system of education, less government intervention was needed, not more (New Zealand Treasury, 1987). Treasury (1987) asserted that government intervention in education had produced its own problems, namely, reduced freedom of choice, decreased standards of efficiency, and inflexible responses to equity issues and thus promoted market forces rather than government control as the solution. Treasury maintained that removing schools from state control and making them directly accountable to their local communities would make the entire school system more efficient.

Neo-liberal ideology assumes that human behaviour is motivated by self-interest and that individuals are competitive, are capable of making choices to achieve their educational goals, and can be held accountable for not making the right educational choices or seizing opportunities available to them (Apple, 2001; Marshall, 2000; Watson, Hughes & Lauder, 2003). Moreover, neo-liberals believe that the “invisible hand of the market is thought to be the most efficient way of sorting out which individuals get what” (O’Neill, Clark &
Openshaw, 2004, p. 33). In other words, they believe that the market place is unsurpassed as a model of and for society.

Treasury officials, in presenting their third argument, described New Zealand’s educational system as poorly managed, maintaining that, “those who provide the inputs to education…teachers…and so on – naturally seek to defend and develop their own interests” (New Zealand Treasury, 1987, p. 271). In other words, Treasury attributed the poor management of schools to teachers putting their own interests above those of their students.

Treasury’s mistrust of teachers and the associated discourse about “producer capture”, echo earlier identical neo-liberal argument for school reform in the United States of America (Apple, 2007, p. 109). It justifies anti-teacher sentiments, demands for greater accountability of teachers to provide evidence of effective work (Apple, 2007), and policies that weaken teacher unions (Apple, 2004). It assumes that public servants are not motivated to perform well and that those working in the private sector are efficient because of competition (Apple, 1996).

The Treasury Brief (New Zealand Treasury, 1987) for the incoming second-term Labour Government, with its critique of the entire education system and its radical recommendations for change, was a defining point for the ensuing education reforms. In 1987, with government supporting fundamental education reforms, the Taskforce to Review Education Administration was set up to examine the organisation of public education, the roles of education boards and the function of the Department of Education (Butterworth & Butterworth, 1998). Chairman of that taskforce was Brian Picot, a businessman chosen because the taskforce was looking not at “goals and educational philosophy but structure” (Gianotti, cited in Butterworth & Butterworth, p. 66). The following year the taskforce published its report, Administering for Excellence: Effective Administration in Education, which became known as the Picot Report (Picot, 1988). From that report came the plan known as Tomorrow’s Schools (Lange, 1988). It defined and shaped what Fiske & Ladd (2000) state is, “arguably the most thorough and dramatic transformation of a state system of compulsory education ever undertaken by an industrialized country” (p. 3).

Inherent in the Tomorrow’s Schools reforms were neo-liberal ideologies manifested as three significant education reform initiatives: decentralisation of the governance and management of schools; making schools directly accountable to their local communities and the Minister
of Education through the school’s charter; and giving parents choice as to which school their child attended in the belief that as schools competed with each other for students, market forces would improve the efficiency of the state education system (Lange, 1988; New Zealand Treasury, 1987).

**Tomorrow’s Schools: the reforms and their effects.**

Three key strands of the *Tomorrow’s Schools* neo-liberal reforms; self-governance, accountability, and a competitive environment, provide possible explanations as to why schools might choose to purchase a commercially produced literacy package. I use these three strands to structure the following discussion on the reforms and the effects they have had on schools, the teachers, and principals who work in them and their stakeholders, and to investigate possible reasons for teachers and principals choosing to use a commercially produced literacy teaching package.

**Self-governing schools.**

With the implementation of the *Tomorrow’s Schools* reforms each New Zealand school became self-governing with its own board of trustees, a charter developed by the principal, staff, and members of the school community, and a government grant for the funding of operational activities (Lange, 1988). Schools, described as “learning institutions” in the Picot Report (Picot, 1988), became the “building blocks” of education administration (New Zealand Department of Education, 1988). Further, key responsibilities (e.g., budgetary management) that had previously been controlled by distant agencies (e.g., Education Boards) were now administered in a partnership between the school’s professionals and its community (New Zealand Department of Education, 1988).

**Principals’ workload.**

With the advent of self-managing schools the role of the principal suddenly became more powerful (Langley, 2009), multi-faceted (Bendall, 2009), and complicated (Fiske & Ladd, 2000). Principals, thrust into the task of managing schools, carried heavy workloads including responsibility for many of the administrative tasks that in the past had been handled by the Department of Education and local Board of Education (Butterworth & Butterworth, 1998; Fiske & Ladd, 2000). Their work had become intensified. Often principals found themselves being asked to do things for which they had no training. For example, Mr Thompson, principal of Lyall Bay Primary School explained, “Dealing with property is a huge area. I
sometime feel as if I have been dropped into the deep end of something for which I had no training” (Fiske & Ladd, 2000, p. 94). Wylie (1999), who researched the impact of Tomorrow’s Schools reforms, found that the main cause of dissatisfaction for 47 percent of principals was the workload and paperwork associated with administration. Conversely, for 44 percent of principals, the main source of satisfaction was teaching and working with students. The average reported workload for principals was 59.5 hours a week and for teaching principals, 60.9 hours, whereas before the reforms only a few principals worked more than 50 hours a week (Wylie, 1999). And, in a similar study involving seven schools, Thrupp, Harold, Mansell & Hawksworth (2000) confirmed Wylie’s findings and found that under self-management, there was a dramatic increase in the workload of principals.

Teachers’ workload.

Teachers also reported working longer hours (Wylie, 1999). Their workload, like that of principals, had also intensified. In 1996, five years after the implementation of Tomorrow’s Schools, the average working week was 48.3 hours but by 1999 this had risen to 50.1 hours with forty-one percent of teachers describing their workload as “excessive” (Wylie, 1999, p. 118). Teachers’ morale was lower than that of principals’. Just over half described their morale as either high or good. Sources of satisfaction for teachers were children’s progress (42 percent) and working with children (also 42 percent). And, like principals, sources of dissatisfaction included paperwork and administration, workload, and stress. Clearly, the introduction of self-managing schools resulted in an increase in the workload of principals and teachers. Thus, the question arises, might principals, in search of a solution to some of their workload intensification and that of their teachers, have purchased a commercially produced package with its prepared lessons, prescribed pedagogy and readymade resources?

Accountability of schools.

The reforms made schools accountable to their parents and students, their primary stakeholders, and to the government of the day on behalf of taxpayers (Bendall, 2009). The belief was that, as in the business world where boards of directors report to their stakeholders, schools would become more effective when they were directly accountable to the community they served (Bendall, 2009; Codd, 2005; New Zealand Treasury, 1987). Just as successful businesses are responsive to market forces, schools would become even more effective as they respond to their ”client” community. Accountability thus became a hallmark of the Tomorrow’s Schools reforms.
Schools could be held accountable in three ways (Wylie, 2009, p. 141). One, the principal could be challenged in a “useful” way by the board of trustees (Wylie, 2009). Two, reviews conducted by the Education Review Office identified the school’s strengths and areas that required development (Education Review Office, 2011). And three, the planning and reporting cycle required by schools since 2003 detailed schools’ progress towards achieving their student learning targets (Ministry of Education, 2012). I first discuss the literature relating to the Education Review Office and then the planning and reporting cycle.

Education Review Office.
For 142 years, from the start of compulsory schooling in 1877, the auditing of New Zealand schools had been the responsibility of the Department of Education inspectorate. Inspectors observed teachers at work, examined planning and official records, awarded teachers a grading mark, and offered advice (Butterworth & Butterworth, 1998). The New Zealand Treasury (1987), in the brief to the incoming government, described the inspectors’ reports as “qualitative and confidential evaluation” (p. 108) and argued that they did not provide enough information to evaluate the state of primary schooling in New Zealand. With the advent of Tomorrow’s Schools, an independent body, the Education Review Office, was established to review institutions on a regular basis (Lange, 1988). Their reports were public.

The chief executive of the Education Review Office encouraged the media to publish school reports (Fiske & Ladd, 2000). The reasons were twofold: one, principals and teachers, knowing their school report was a public document, would try to ensure they received a positive report, and two, a positive school report could attract potential students and the considerable funding and resourcing generated by roll count. Teacher unions voiced concern about the media’s focus on bad news and school crises. A review of the Education Review Office (ERO), commissioned by the Post Primary Teachers Association (PPTA), expressed teachers’ fears that highlighting the negative could contribute to the public’s perception of an education crisis and aggravate the plight of failing schools (Fiske & Ladd, 2000; Thrupp & Smith, 1999). The PPTA report was critical of ERO’s practices and found that “effectiveness reviews focussed on compliance with managerial and administrative procedures rather than on educational processes and outcomes” (Thrupp & Smith, 1999, p. 191).

Not surprisingly the school review reports produced by ERO provoked a wide range of responses from the schools affected (Fiske & Ladd, 2000). Wylie (cited in Fiske & Ladd, 2000), after surveying primary principals who had been reviewed in 1995-96, found that 51
percent considered the experience had been positive while 49 percent described their experience as negative.

**The planning and reporting cycle.**

Since 2003 school boards of trustees have been required to include annual targets for improved student achievement and, in the board’s annual report, “an analysis of any variance between the board’s targets for what students would achieve…and what actually happened during the year” (Controller & Auditor General, 2010, section 9.1). This involved boards preparing strategic plans, setting targets and reporting on progress in meeting these. The Office of the Auditor General, assessing the quality of the 2009 analysis of variance reports, noted whether a reader (e.g., a parent) could easily identify why the school had selected the annual targets, know what progress had been made in meeting the targets, and understand what the board would do the following year in response to its analysis. The Auditor General found considerable variability in the quality of the analysis of variance reports and noted that only 15 percent of schools had “very good analysis of variance reports” (Controller & Auditor General, 2010, section 9.22), that 72 percent were partially meeting requirements and 13 percent had not engaged in strategic planning and self-review (Controller & Auditor General, 2010).

Might it be that the greatly increased demands made of schools to collate data, submit targets and be publicly accountable for their student achievement, is in part driving principals’ decisions to purchase a commercially produced literacy teaching package? Package teaching activities are, as May (2011) notes, “seen as more easily measurable” (p. 280). Perhaps that “measurability” dimension gives teachers and principals reassurance as they seek to meet accountability demands.

**A competitive environment.**

Underlying the *Tomorrow’s Schools* reform was the notion that if schools were to operate in a competitive environment the quality of education would lift (New Zealand Treasury, 1987). With the removal of enrolment schemes, schools competed for resources and students and parents exercised choice as to which school their child attended (Butterworth & Butterworth, 1998; Gordon, 2010; Smelt, 1998). These reforms marked the beginning of marketisation in New Zealand education (Marginson, 1997).
The effects of parental choice and competition.

Policies aimed at giving parents choice of school for their children impacted on schools in very different ways. In the Smithfield Project, Lauder, Hughes & Watson (1999) compared the effect of marketisation on four secondary schools in the same city but with different socio-economic and ethnic profiles. They found that the professional families moved away from the two schools in low socio-economic areas while the poorer families remained, an example of the so-called middle class white-flight. One of the two working class schools, having lost many students and, as a consequence, a large number of teachers, employed marketing and management consultants to try and turn around the downward spiralling. The remaining two schools were middle-class and, because of the white-flight phenomenon became “over-crowded” schools and as such were able to impose their own zone and select their students.

The fickleness of marketisation in education becomes apparent in studying the findings of the Smithfield Project (Lauder et al., 1999). Tomorrow’s Schools introduced a new law, The Education Act, 1989, under which schools with an enrolment scheme had a defined home zone. Any student living within this home zone had the right to attend the local school. This policy, introduced to create a level playing field, strengthened middle-class schools to the extent that their rolls increased. An amendment to the Education Act 1989 gave schools with a problem of overcrowding the right to determine the content of their enrolment scheme (Education Amendment Act, 1991). Further, students no longer had an absolute right to attend their local school (Education Amendment Act, 1991). Ironically, in those middle-class schools it was not parents who decided which school their child attended, rather the school, in crafting the content of their enrolment scheme, selected the students they wanted (Lauder et al., 1999). Conversely, the impact of the abolishment of school zoning on the working class schools was devastating. Higher socio-economic families exited schools with poorer students (Apple, 2001). As Apple (2001) states, “Markets systematically privilege higher socio-economic status families through their knowledge and material resources” (p. 418). Competition created winner and loser schools.

Competition has not always brought about social justice and benefitted so-called disadvantaged students (Watson, Hughes, Lauder, Strathdee & Simiyu, 1998). In Watson et al.’s 1998 study to examine the different patterns of choice and whether students were equally able to access their preferred school, the researchers found that Pakeha, Māori and Pacific Island students moved away from their local working class school to a school with a higher
proportion of Pakeha students. The socioeconomic status of students who moved away was higher than that of the students who remained at the local school. Consequently, the mean socio-economic status (SES) of students at the local school became lower. Also, when parents were asked to name their school preferences, when these names were matched with the names and ethnic groups of students attending specific schools it was apparent that few Māori students were attending those schools with a high mean SES. Those schools had more applicants than they had places and, because they had enrolment schemes, were able to select their additional students. They selected Pakeha students over Māori in their selection criteria.

*The culture of competition – parental choice.*

According to Wylie (1999), anecdotal information from principals indicated that 10 years after *Tomorrow’s Schools*, more parents than before were gathering information about prospective schools for their child. A study of parent choice in Palmerston North found that around half of primary and intermediate parents considered more than one school before making their choice (Wylie & Chalmers, cited in Wylie, 1999). Choice decisions about schools are made on a number of factors, namely, the decile ranking of the school with schools having higher decile rankings being more popular, and the school’s reputation (Beaven, 2003). Thus, might it be that the parental choice thrust of *Tomorrow’s Schools* is operating? In an environment of competition and keenly exercised parental choice, have schools purchased a commercially produced package as evidence to prospective parents that they are implementing specific programmes, some of which are well-known (e.g., *Jolly Phonics*), and thereby suggesting that they offer their students more than the neighbouring schools?

*The culture of competition – schools’ response.*

Ten years after the introduction of *Tomorrow’s Schools* the number of principals who felt that their school was competing with others had increased from twenty-one per cent just three years earlier to thirty-one per cent of principals (Wylie, 1999). Schools that had lost students found that despite being open to change, willing to meet family needs, and making efforts to promote and market their school were not able to counter what they perceived as unfair and ill-informed assessments by prospective parents about the quality of the schooling they offered. Further, according to Gordon (2010), the competitive environment within which schools operate, fosters a “play-it-safe” approach whereby schools avoid any negative
publicity and are reluctant to talk openly about their problems. Rather, they seek good publicity for themselves and they engage in marketing.

**Conclusion.**

In summary, outcomes emanating from the three strands of the radical neo-liberal reforms of the governance and administration of education may be related to schools’ decisions to use a commercially produced literacy package. The first of these is the intensification of the workload of principals and teachers that occurred when schools were made self-managing. Suddenly the amount of work associated with administration and assessment increased dramatically. And, as the literature reports, principals and teachers identified this as their greatest source of dissatisfaction. In short, many teachers and principals consider themselves to be over worked. Could it be that some schools, in an attempt to cope with intensification, have purchased a commercially produced package?

The second strand, that is, schools being held accountable to their community and to the government, may also have played a part in schools’ decisions to use a pre-packaged curriculum. The board of trustees, using information from the principal and teachers, monitors students’ achievements and reports on these against the national curriculum objectives. Further, the Office of the Auditor General and the Education Review Office as external agencies, review and report on the accountability of schools. In other words, the work and performance of schools is expected to be both transparent and public to provide the evidence of efficiency and quality that neo-liberalism requires (Apple, 2007). Could it be that some schools have selected a commercially produced package to assist them cope with the increased accountability demands? Are packages being used because they provide evidence of the teaching of phonics, spelling and/or writing programmes?

The third strand, competition, has meant that schools operate in a highly competitive environment competing with other schools for students, and the funding and resources that each student generates. This is especially so in urban areas such as Dunedin where parents can exercise choice as to which school their child will attend. Marketing is thus the schools’ response to the competitive environment. With that in mind, might it be that some schools purchased a commercially produced package as evidence of the programmes offered in comparison to other schools in the area? Are packages being used, because, as Shannon (1987) argued, they are perceived as having been developed by an expert using scientific knowledge and therefore offer prospective students better value than neighbouring schools?
The second wave of reforms.

Whereas the fundamental thrust of the *Tomorrow’s Schools* reform was transforming a highly connected and centralised schooling system into stand alone, self governing, and self managing neighbourhood schools, the second wave of reforms focused on the core tasks of schools, namely, what teachers teach, the curriculum, and the assessment of student learning (Butterworth & Butterworth, 1998). A new national Curriculum Framework was distributed to schools in 1993 (Ministry of Education, 1993). It provided a structure of seven essential learning areas (languages; mathematics; science; technology; social sciences; the arts; and health and physical well-being), generic skills, and specified achievement objectives at eight defined levels in each subject area (Marshall, 2000; Ministry of Education, 1993). Unlike previous syllabuses that prescribed what teachers were to teach, the new curriculum focused instead on the outcomes of teaching, emphasising product rather than “the processes of learning and thinking” (Codd, 2005, p. 196). This outcomes-based curriculum, with a focus on technical knowledge and performance rather than understanding, and a proliferation of measurable skills, was designed to maintain the accountability of teachers and the competitive market environment, signalling a continuation of neoliberalism (Lee, O’Neill & McKenzie, 2004; O’Neill et al., 2004).

Given that this study investigates the use of literacy teaching packages I focus on the English document, *English in the New Zealand Curriculum*. This was the official curriculum statement when, according to anecdotal reports, in the first five years of the new century the use of packages commenced. I examine literature about its form and structure, changes to student assessment procedures in primary schools, and the ensuing manageability and pedagogical issues that may have influenced schools’ decisions to purchase a commercially produced literacy package. When interrogating curriculum and underlying agendas Apple (1993) identified two aspects that warrant examination, namely, content (what is included and what has been omitted) and form (how the content is organised) and argues that they reveal “particular constructions of reality, particular ways of selecting and organizing the vast universe of possible knowledge” (p. 49). In addressing the content and form of *English in the New Zealand Curriculum* I identify what McFarlane (2004) describes as “the many difficulties in understanding, accepting and implementing the requirement” (p. 283) of this document.
Content.
Two aspects of the content of *English in the New Zealand Curriculum* require examination, namely, the lack of subject matter and its use of confusing terminology. Given that both these aspects made the interpretation and implementation of the curriculum document difficult, might schools have been attracted to the use of a literacy teaching package, with its clarity of purpose and direction, prescribed pedagogy, and readymade teaching resources?

A surprising feature of the English document is its lack of information about the content of literacy teaching (Brown, 1998; Education Review Office, 2001; Locke, 2000). The document omits to specify which genres, topics, texts, and purposes are to be taught at any level (Brown, 1998). In the words of Brown, “It is a curiously contentless document” (p. 9). Further, the document de-emphasises knowledge, and in place of prescribed content highlights the skills students use to respond to texts (O’Neill, 2005). Skills, easier to measure than knowledge and understanding, facilitate transition to the labour market (Peters & Marshall, 2004).

The terminology in the English document confused teachers (Locke, 2000; 2002). For example, teachers debated the meanings of the terms “expressive”, “transactional” and “poetic” used to categorise types of writing. In addition, the difference between the process strands and function strands of the document was unclear. According to Locke (2000), the distinction was “artificial”. Both functions and processes were worded as descriptors and therefore both were about what students can do thus giving the ease of measurability and accountability demanded by neo-liberalism.

Form.
Similarly, the organisation of *English in the New Zealand Curriculum* confused teachers and might have been another reason why schools, in seeking clearness and precision, chose to purchase a commercially produced package to use in their literacy programmes.

The English document, like those for the other learning areas, was a “ladder” of eight progressive levels of defined competencies called achievement objectives (Locke, 2000). Student progress was to be measured against these statements of achievement or learning outcomes (O’Neill, 2005). The learning outcomes, “vague indicators of progress,” (O’Neill, 2005, p. 81) were broken down into smaller specific lesson objectives by every school and therefore became the drivers of lesson content and pedagogy (O’Neill, 2005). The emphasis
on learning outcomes and the reduction of knowledge to something that is produced, observable and measurable is indicative of a preoccupation with performativity (Codd, 2005). In the culture of performativity “good practice is defined in terms of a set of pre-defined skills or competencies” (Codd, 2005, p. 201).

The levels were controversial and problematic (Brown, 1998; Elley, 1994; Locke, 2000). The notion that knowledge can be divided into arbitrary levels has no foundation in research or learning theories (Elley, 1994; O’Neill, 2005). In terms of the English curriculum, as Muller (cited in Locke, 2000) argued, “no one tried to define the ‘natural’ sequence of English studies from the beginning of school to the end because there is no such thing” (p. 10). Furthermore, formulating statements that demonstrate progression is too difficult (Elley, 1994).

Elley’s (1994) concerns about the imposition of an eight-level model in a subject like English were justified. Teachers had difficulty in differentiating between the levels. For example, in the section named Close Reading the levels are defined as follows:

Level 1: Students should respond to language and meaning in texts;

Level 2: Students should respond to language and ideas, in different texts, relating them to personal experiences. (Ministry of Education, 1994, p.34)

That begs the question – what is the difference between Level 1 and Level 2? In order to respond to language and meaning in texts (i.e., Level 1) surely students will read different texts and relate these to their own experiences (i.e., Level 2). As Elley (1994) argues, “These subtle semantic distinctions are contrived and arbitrary, and surely unhelpful in teaching and assessing children’s progress from level 1 to 4 (i.e., about eight years of schooling)” (p. 42). Further, when it is so difficult to specify learning steps how can teachers reliably assess students’ skills? (Elley, 1994).

Assessment – Two competing discourses.

The other target of the second wave of reforms was assessment of student achievement (Codd, 2005). The eight-level framework of *English in the New Zealand Curriculum* was intended to provide for easier assessment of student progress (Elley, 1994). Assessments were to be directly linked to the standards, or in other words, the curriculum levels (Codd, 2005),
thus introducing what was for many teachers a new form of assessment known as criterion-referenced or standards-based assessment (Elley, 1994).

The purpose of standards-based assessment, accountability, is in contrast to that of formative assessment, regarded by many as an established helpful, diagnostic tool for teachers. Thus, teachers had to deal with two competing discourses of assessment, namely, (i) assessment of learning, and (ii), assessment for learning (Crooks, 2011). The difficulty for teachers in reconciling these two very different forms of assessment was noted. Nisbet (cited in Hill, 2002) argued that, “the demand for accountability…will take precedence over the equally legitimate requirement that assessment should promote learning…because it involves ‘higher stakes’” (p. 115).

If the purpose of the eight-levels structure is to provide summative assessment about the achievement of all students “for reporting to parents, boards of trustees, ERO or Ministry - the question must be asked as to whether the level statements are sufficiently clearly specified to enable teachers to do this in fast and accurate fashion” (Elley, 1994, p. 45). This was not the case. Teachers, stressed and confused, engaged in an “assessment frenzy” as they tried to satisfy the new requirements (Hill, 1999). Indeed, the time needed to meet assessment demands and the lack of clarity of the level statements resulted in assessment becoming one of the most challenging features of the reforms for teachers (Wylie, 1999). This tension between the pressure to fulfil accountability requirements and matching assessment to the indistinct curriculum levels can be identified as a hallmark of neo-liberalism (Apple, 2007). It resulted in the intensification of teachers’ work, the “crowded” curriculum (May, 2011), the implied mistrust of teachers and the constant demands for evidence that teachers were performing appropriately.

As with the confusion generated by the content and form of the curriculum document, the two competing and contradictory discourses about assessment may also have prompted schools to consider package use for literacy teaching.

**The New Zealand Curriculum 2007.**

Of interest to this discussion on the curriculum reforms is the publication of *The New Zealand Curriculum* in 2007. This new single document replaced the Curriculum Framework and the separate syllabuses (referred to above) for each of the seven essential learning areas. While maintaining the eight-levels structure, introduced in the previous curriculum, there are fewer
achievement objectives. In comparison to the previous curriculum, the differentiation between levels is clearer. The document specifies that students operating at Level 1 will “acquire and begin to use strategies” (Ministry of Education, 2007, Level One, English, para. 1) whereas students working at Level two will “select and use sources of information, processes, and strategies with some confidence” (Level Two, English, para. 1) – a clear indication of progress. The terminology (i.e., transactional, expressive and poetic) that caused confusion in the previous document is not part of this document.

**A third wave of reforms.**
The New Zealand neoliberal educational reforms that began in the late 1980s continue apace. Indeed, current government policies, National Standards, the publication of league tables, merit pay for teachers, and charter schools clearly signal that the momentum of education change is not slowing (New Zealand Educational Institute, 2012).

**The National Standards.**
In 2009 the National Government’s announcement that National Standards in reading, writing, and mathematics would be introduced the following year caused consternation among teachers and educators (Flockton, 2009). The then Minister of Education, Anne Tolley, in a National Standards launch pack, explained the reason for National Standards: “Nearly one in five of our young people leave school without the skills and qualifications they need to succeed. This has to change” (Tolley, 2009). According to Flockton (2009), “about 10% of children struggle to achieve and most of these children experience considerable disadvantage in their life circumstances. Most developed countries have similar percentages and in those countries, their National Standards have failed to make a difference”. The rationale for the National Standards was “to provide signposts that give teachers, children, parents, families and whanau a clear idea of where children are at in their learning and what they have to do next” (Tolley, 2009, p. 1). Critics of National Standards, concerned that young children will be labeled failures, claim that teachers already know how students are performing and that they do not need National Standards to identify those students who are struggling (New Zealand Educational Institute, 2012). Furthermore, in an open letter to the Minister of Education, four academics critiqued the brief time allowed for implementing the National Standards, the absence of trials and consultations, and the flawed assumption that children “are failing if they do not meet the standard for their age” (Thrupp, Hattie, Crooks & Flockton, 2009, para. 5).
This political initiative, National Standards, with its emphasis on teacher and school accountability, is clearly a continuation of the second wave of neo-liberal reforms of the 1990s and may, at the present time, be contributing to schools continuing their usage of teaching packages and, in some cases, to schools deciding for the first time to implement a commercially produced package as part of their literacy programme.

**Conclusion.**

In summary, this second wave of reform, with its focus on curriculum and assessment is, like the earlier reforms, characterised by strong political origins and neo-liberal ideology. The core curriculum documents were difficult to implement with the eight-level framework based on arbitrary divisions of knowledge; the contrived distinctions between levels; the on-going confusion over terminology; and the introduction of assessment for accountability and the focus on performativity. Additionally, the implementation of National Standards, currently underway, and the expectation that league tables will be created from data provided by schools to the Ministry of Education, would seem to predicate the introduction of even tighter accountability measures for teachers and schools. Thus, the neo-liberal reforms that commenced in the 1990s continue to impact heavily on the work of teachers, and indeed the work of schools. The process of intensification and the constant accountability pressures continue apace.

Might it be that the defining features of commercially produced packages, namely, specific teaching goals, prescribed pedagogy, pre-planned lessons, readymade resources, and professional development components, continue to offer timely solutions to some of the many school change challenges confronting principals?

**Section 2 - Intensification of Teachers’ Work**

In seeking to understand why principals and teachers of some Dunedin primary schools have chosen to use what Apple & Jungck (1992) call “prepackaged commercial material” (p.29), or, in other words, a commercially produced package, I examine the literature about the changing work of schools and teachers, the external forces that precipitate and drive that change, and the impact intensification has on teachers. Perhaps, for some schools, the purchase and use of a readymade, time-saving, commercially produced literacy package helps to lessen the effect of intensification.
Apple (1986, 1995, 1996, 2001, 2007) has provided definition and shape to what is now an extensive body of knowledge contributed to by researchers worldwide on school change and its impact on those who work in schools. The erosion of teachers’ work is well documented. But what are the forces behind this change? According to Apple (2001), “If we were to point to one specific defining political/economic paradigm of the age in which we live, it would be neoliberalism” (p. 17). McChesney (cited in Apple, 2001) states:

> Neoliberal initiatives are characterized as free market policies that encourage private enterprise and consumer choice, reward personal responsibility and entrepreneurial initiative, and undermine the dead hand of the incompetent, bureaucratic and parasitic government, that can never do good even if well intended, which it rarely is. (p. 17)

In this section I discuss the impact of neoliberalism on schools and examine Apple’s explanations for changes in teachers’ work, namely, intensification and teachers’ sense of professionalism.

**Neo-liberal education reforms and increased teacher workload.**

Almost three decades of widespread, sustained government-initiated, neo-liberal education reforms have resulted in the marketisation of education, the introduction of business models into the governance, management and the operation of schools, and the development of “an audit culture” (Apple, 2007, p. 112). Core elements of these neo-liberal reforms are “embedded in three interrelated policy technologies: the market, managerialism and performativity” (Ball, 2003, p. 215).

Neo-liberalism privileges market values above all others (O’Neill, Clark & Openshaw, 2004). The market approach assumes that as schools compete for students and resources they will become more efficient and responsive (Codd, 2005). Using the discourse of the market, schools, like small business firms, work to attract “consumers” by increasing their “outputs” or learning outcomes. Managerialism is about efficiency and quality in schools. Neo-liberalism assumes that with “dynamic, efficient, productive” managers, schools will tighten their forms of accountability and offer transparency to their consumers (Apple, 2001, p. 30). Again, like small business firms, schools, in their quest for quality and excellence, are expected to engage in strategic planning, set objectives and targets, review their performance, and closely monitor the work of their teachers (Codd, 2005; Day & Smetham, 2009). The demand for evidence that teachers are working appropriately is constant (Apple, 2004).
Teachers, considered to be driven by self-interest, are therefore mistrusted and are made accountable through “paper trails of monitoring” (Hargreaves, 2000, p. 168). Managerialism fosters a culture of performativity in which teachers are judged by what they produce (Codd, 2005). In the words of Apple (2007), “only that which is measureable is important” (p. 112). Predetermined, quantifiable performance indicators are used to assess student learning. Critics of this managerial culture argue that caring relationships with students are not valued and there is no place for initiative (Ball, 2003).

A critical outcome of the neo-liberal reforms is the negative impact they have had, and continue to have, on the work and lives of teachers (Apple, 2007). Indeed, Apple, (2004) describes the effects of neo-liberalism and managerialism as “increasingly dangerous” (p. 14). Multiple studies report teachers working longer hours to implement new initiatives, learn about curricula developments, meet accountability demands, and plan and teach programmes that cater for the diverse needs of a wider range of students, including those with challenging behaviours and with a home language other than English (Easthope & Easthope, 2000; Williamson & Myhill, 2008; Day & Smetham, 2009; Galton & MacBeath, 2008; Helsby, 2000; Horder, 1995). In the words of Ball (2003), “what it means to teach and what it means to be a teacher…are subtly but decisively changed in the processes of reform” (p. 218).

While time and effort spent on the core tasks of planning, teaching, and keeping abreast of curriculum changes has intensified, teachers are also required to spend more time and effort establishing monitoring systems, collecting performative data, and completing paperwork required for accountability purposes. Thus, a contradiction results from the intensification required by the core teaching tasks and the simultaneous increase in time and effort spent on collecting and managing performative data. Lyotard (as cited in Ball, 2003) calls this the “law of contradiction” (p. 221). Further, as teachers try to balance their work and accountability demands, the result is often what Apple (1996) describes as “management by stress” (p. 7).

**Increased teacher workload: What is happening?**

Day and Smetham (2009) note that, “whilst educational change itself is not a new phenomenon, what is new…is its frequency and intensity and the ‘manner of change’ which appears to have significantly increased workload” (pp. 143-144). Researchers in four different countries, namely, the United States of America, Australia, New Zealand, and England, report remarkably similar findings about the changing nature of the work of schools and its impact on the professional and personal lives of teachers.
Tye and O’Brien’s (2002) study examining teacher shortage and the reasons for Californian teachers leaving the profession, found that teachers left because of increased demands for more and more accountability, in particular, the emphasis on high stakes testing and the time and pressure to prepare students for those tests. Teachers also cite increased paperwork and negative student attitudes as additional factors in their decision to exit the teaching profession. Further, Tye and O’Brien note that because teachers do not have time to talk to colleagues, they feel alienated, and tend to blame themselves when they experience lack of job satisfaction and discontent. Of particular significance is the researchers’ conclusion that the causes of teachers wanting to leave their jobs are systemic rather than personal, and their assertion that “it is impossible to overestimate the degree of job intensification that has taken place in teaching over the last decade” (p. 28). In other words, Tye and O’Brien’s study, in identifying and itemising reasons for teachers leaving the profession, finds systemic factors to be the underlying cause for the Californian teacher shortage.

Similarly, the impact of systemic change factors on teachers’ work and wellbeing is evident in Australia. Williamson and Myhill’s (2008) comprehensive study of teachers’ workloads across the state of Tasmania found that almost half the surveyed teachers fit into the Australian Bureau of Statistics’ “Very long working hours” category. Most teachers (89%) work between 40 and 60 hours a week and have an increased workload in both teaching and administration. One experienced teacher, struggling with her workload, described her job as “having no end point” (p. 30). Outcomes of this increased workload included teacher resistance to change, selective change implementation, teacher cynicism, and lack of time for reflection (Williamson & Myhill, 2008).

The situation is similar in New Zealand and might be related to schools’ decisions to purchase a commercially produced package to teach part of their literacy programme. Gammie (2000) found that the workload of teachers and principals in Marlborough escalated sharply between 1996 and 1999, and that 41% of teachers believed their workload to be too high. At that time New Zealand schools were adjusting to the massive neo-liberal, government-initiated reforms of the early 1990s (Codd, 2005). Teachers considered the paperwork to be the least satisfying aspect of their job and commented negatively on class sizes, assessment requirements, and working with students with behavioural problems. As with the Californian study (Tye & O’Brien, 2002), it was the system change factors that were driving changes to teachers’ work.
Another New Zealand study, Harker, Gibbs, Ryan, Weir and Adams (2003), reports that the sources of stress identified by New Zealand primary teachers included high workload, administrative and paperwork demands, a lack of financial resources and time to cope with change, inadequate support for teaching students with special needs, children for whom English is not their home language, and children with behavioural problems. The inadequate physical conditions in old school buildings were identified as further sources of teacher stress. Teachers also expressed frustration at barriers that diverted them from what they considered their core function, teaching, and described the pressure they felt to allocate time to marketing their school and fund raising.

Kane and Mallon’s research (2006), The Perceptions of Teachers and Teaching, commissioned by the Ministry of Education and the New Zealand Teachers Council, found that primary teachers’ increased workloads are associated with new curricula and assessment initiatives, societal changes, and the unreasonable pace at which teachers have had to adapt to these changes. Data from the three groups of participants, principals, teachers, and board members showed that “the ever increasing workload of teachers is having a serious impact on the retention of teachers” (p. 72). A primary teacher in Kane and Mallon’s study who was working an 80 hour week, stated:

    Over the years more and more demands are being placed on teachers which interfere with our ability to carry out effective teaching practices. The paperwork has doubled and with it the stress placed on teachers to be better than their ‘best’. (p. 72)

Additionally, teachers report feeling ill-equipped to deal with issues they consider to be the responsibility of the parents and family, for example, the management of children with challenging behaviours. In the words of one teacher in Kane and Mallon’s (2006) study, “Society now expects teachers to ‘parent’ their kids” (p. 80).

Like their New Zealand colleagues, English primary teachers report feeling pressured by the amount of paper work they are required to complete, having to comply with government mandated timetable schedules to meet literacy and numeracy targets, and to achieve satisfactory results in the Standard Assessment Tasks (Galton & MacBeath, 2008). Teachers increased the number of hours they work, begrudged the loss of time to listen to children, felt tired, and experienced a loss of confidence and control with the implementation of new initiatives.
Five years after Galton and MacBeath’s (2008) initial investigation, the researchers interviewed the same English primary teachers and discovered they were working even longer hours, and spending more time on assessment. Whereas, in the initial study, teachers did not comment on students with behavioural problems, in the follow-up study they found teachers’ confidence was shaken dealing with these students and their confrontational parents. However, the introduction of Planning, Preparation and Assessment Time (PPA), a 2005 contractual provision that entitled teachers to 10% of their timetabled teaching time to be set aside as non-contact time for planning and assessment (Association of Teachers and Lecturers, 2011), made teachers feel valued and gave them a sense of ownership over how and where they worked (Galton & MacBeath, 2008).

In summary, the above studies confirm Apple’s (1986, 2007) arguments that education reforms and neo-liberal policies have had a negative effect on the work of schools and teachers. Using a raft of methodologies (questionnaires, teachers’ diary entries, and interviews with individual teachers and with focus groups) researchers in four different countries report similar findings. As a consequence of these reforms, the workload of teachers has increased and become more complex and left teachers feeling mistrusted, estranged, frustrated, demoralised, tired and lacking self-confidence (Galton & MacBeath, 2008; Harker et al., 2003).

**Intensification and professionalisation.**

Apple’s (1986) study of the labour force and Marxist theories was the genesis for two explanations as to why teachers’ workload has changed, namely, professionalisation, and the intensification thesis. The first explanation, professionalisation, is defined by Hoyle (1982) as the process whereby teachers meet the criteria attributed to the teaching profession (pp. 161-162). It emphasizes the increasing complexity of teachers’ work, their commitment to ongoing professional development, involvement in leadership roles, collaborative partnerships, and school wide change (Hargreaves, 1994). The other explanation, intensification, is defined as the “increasing pressure to do more in less time, to be responsive to a greater range of demands from external sources, to meet a greater range of targets, to be driven by deadlines” (Galton & MacBeath, 2008, p.13). Apple and Jungck (1992) explain that intensification has many symptoms ranging “from the trivial to the more complex…from having no time at all even to go to the bathroom, have a cup of coffee or relax, to having a total absence of time to keep up with one’s field” (p. 25). Additionally, because teachers’
work has intensified, they have less time to connect with and care for their students.
Hargreaves (1992), like Apple (1986), also posits intensification as a valid explanation for the
changes in teachers’ workload and identifies the effects of intensification as leading to on-
going overload and, as teachers try to manage their time, a dependency on prepackaged curricula (pp. 88, 89).

In exploring reasons for changes to teachers’ workload, Apple (1986) brings these two explanations together and argues that in the world of schools, both professionalisation and intensification interact to reshape the work of teachers. He presents a convincing argument that as teachers are becoming increasingly controlled they unwittingly support intensification under the guise of professionalism. Apple described how teachers at a school with a curricula “system”, that is, the curriculum was based on behaviourally defined competencies, spent large amounts of time marking and recording information from students’ pre-tests, post tests, and worksheets as well discussing students’ progress with parents. Teachers worked on tasks before and after school and at home each night. Although the teachers’ workday was lengthened, the use of technical criteria and tests made teachers feel more professional and convinced them that the longer hours and intensification of their work was necessary.
Working harder, working longer hours, and using technical elements were mistakenly seen as symbols of professionalism. In reality, however, the teachers’ professionalism was diminishing; they were becoming de-professionalised.

A further aspect of the interplay between notions of professionalisation and intensification captured Apple’s (1986) attention. In delving into the nature of what was happening in schools, and exploring how the work of schools shaped what teachers did, he highlighted what seemed to be a paradoxical relationship between intensification and professionalism. He recounted school situations in the 1980s when teachers, mostly women, in their eagerness to be recognised as professionals and, using images and stereotypes of what it is to be a professional, increased their management skills, their knowledge, accepted extra responsibility, and increased the hours they worked. On one hand the impetus to be seen to be more professional came from teachers themselves. On the other hand, the use of curricular systems implemented by school managers and other stakeholders, controlled what teachers taught, and surreptitiously reshaped how they worked.

In the above school scenario, two clear outcomes were apparent to Apple (1986). One, was that teachers felt they were “more professional” because of the changes to their work. The
second was that they did more. Moreover, as Apple (1992) asserts, the reality is very different: teachers are actually becoming both de-professionalised as they follow decisions made by others, and deskillled as they lose control of such activities as curriculum planning, selecting learning activities and choosing the lesson content.

**The ‘Experience of Intensification’ - an extension of Apple’s (1986) intensification thesis.**

An innovative extension of Apple’s (1986) intensification thesis emanated from the work of Ballet and Kelchtermans (2008, 2009). Following an extensive review of the literature they conducted school-based research on teachers’ responses to intensification and, like Apple (1993), found that teachers react in different ways. Apple (1993) noted that in attempting to cope with intensification some teachers “cut corners”, sacrificed quality of work for quantity, and lost self-confidence as they began to rely on “experts”. Others resisted intensification and subtly subverted policy directives, for example, they time-tabled slower-paced activities during the school day and changed pre-specified objectives (Apple, 1986, p. 44)

While Apple (1986, 1993) provided explanations as to how teachers responded to intensification, the focus for Ballet and Kelchtermans (2009) was in identifying the influences in schools that shaped teachers’ behaviours. Underpinning their extension of Apple’s thesis are three central findings (Ballet & Kelchtermans, 2008, 2009). First, the sources of intensification include not only external policy makers but also individual teachers who put pressure on themselves. Second, external demands for change are interpreted and mediated by school teams and by individual teachers, and, third, that teachers respond to intensification in different ways. Whereas Apple (1986) identifies the dominant discourses of intensification and professionalisation, Ballet and Kelchtermans (2008, 2009) acknowledge and describe the various ways in which teachers respond to these dominant discourses.

In discussing their refinements to Apple’s (1986) intensification thesis, Ballet and Kelchtermans (2008) identify the importance of what they call mediating factors, for example, the particular way the school is organised, the leadership style of the principal, and the degree of collegiality among teachers. They argue that these mediating factors can act as a buffer between external demands for change and teachers and can also, paradoxically, exert pressures on other teachers to implement change.
Ballet and Kelchtermans (2008) acknowledge the fundamental role that the individual teacher’s interpretative framework plays in determining how he or she ascribes meaning to changes. Teachers do not just passively accept change. Their response to change is dependent on how they interpret the significance of the change. For example, teachers can respond positively when dedication and hard work are the norm at their school: their beliefs in collegiality and their loyalty to fellow teachers drive them to increase their workload. If teachers believe their students will ultimately benefit from implementing an innovation or, if they perceive that their professionalism is at risk if they do not adopt it, they are more likely to proceed and incorporate the innovation into their programme. Furthermore, if teachers believe they must be accountable at all times and demonstrate their competence, they will accept change. On the other hand, teachers also reject changes for different reasons. Ballet and Kelchtermans (2008) provide the example of a teacher refusing to make more use of computers because “in her opinion that destroys a quality interpersonal relationship between teacher and pupils” (p. 62).

The significance of the work of Ballet and Kelchtermans (2008, 2009) warrants comment. Their findings on the pivotal role of mediating factors in how teachers view and respond to change extend Apple’s (1986) intensification thesis. This contribution to the growing body of research on the intensification of teachers’ work is recent, innovative, and timely in its recognition that teachers can and do modify the effects of workplace change.

Conclusion.

Four major findings have emerged from this body of research. One, over the past three decades teachers’ work has changed and intensified. As teachers respond to a barrage of reforms, curricula and societal changes, and demands for greater accountability and increased assessment, they are being asked to do more in less time with fewer resources. In short, their workload has increased and become more complex. Two, the changes have impacted on both the work of schools and the work and lives of teachers. Increased workloads, increased administrative duties, and societal changes create pressure for teachers. They feel tired, alienated, frustrated, have lost self-esteem, and are resentful of the paperwork demands and the lack of time to care for their students. Three, there are two widely accepted and inextricably linked explanations for changes to teachers’ work, the twin theses of intensification and professionalisation. As teachers implement new policy and curricula changes they carry out decisions made by other people, namely, policy makers and
curriculum developers (Apple, 1986, 2007; Apple & Jungck, 1992). Consequently, as teachers’ workloads intensify, their professional decision-making is reduced. And finally, teachers react to intensification in different ways. Mediating factors within schools (e.g., collegial teams of teachers) and the meaning that teachers attribute to demands for change influence their response to intensification.

Given that teachers’ work has intensified and become more complex and demanding, could it be that some schools, in order to cope with demands for greater accountability, curricula and societal changes, and ever increasing workloads, have decided to purchase and use a commercially produced literacy package? Might it be that by using what some call “prepackaged curricula” and “readymade teaching plans” teachers are provided with clarity of content, and free them to decide which pedagogy to use?

**Section 3: The Reading Wars**

The starting point of this study was anecdotal reports suggesting the use of commercially produced literacy packages is widespread in New Zealand primary schools. Many of these packages are sold as “complete” programmes designed to be used by schools to teach phonics. They include a teacher’s handbook with lesson sequences, details of teaching pedagogy, and activities for students to practise and reinforce new phonics skills. Additionally, some packages have optional vocabulary-controlled texts. Therefore, in pursuit of answers as to why schools choose to purchase a commercially produced package, in this section I examine the literature pertaining to the positioning of phonics in the literacy curriculum. I also investigate links between the recurring public debates on reading and so-called “literacy crises” (Soler & Openshaw, 2007), and explore the social, political and educational factors that underpin the debates. In other words, I am reviewing the literature of what is known as the reading wars (Pearson, 2004; Smith & Goodman, 2008), the literacy debates (Soler, 1999) or the great debate (Chall, 1967).

The debate has, and still continues to be, a protracted and often-heated international argument often played out in the media over reading pedagogy. Researchers, educators, legislators, and policy makers as well as members of the public have from time to time positioned themselves in one of two perspectives. One group believes that children learn to read best when meaning is emphasised; the other asserts that reading instruction should begin by first mastering the alphabetic code (Chall, 1967). Chall, in her 1967 classic text, *Learning to Read: The Great Debate*, pinpoints the heart of the argument with her question, “Do children learn better with
a beginning method that stresses meaning or with one that stresses learning the code?” (p. 75). Today, over forty years later, the debate about the best way to teach reading continues.

The literature I review has been published since the publication of Chall’s (1967) book and includes research and policy reports, teachers’ handbooks and, because so much of this debate has been argued in the public arena, newspaper articles. Most of the literature reviewed was published within the last two decades; the exceptions being significant scholarly texts relating to the teaching of reading (e.g., Clay, 1979a, 1979b; Goodman, 1967, 1986 and Goodman & Goodman, 1981). I begin by presenting a background to the reading debate with a specific, but not exclusive, focus on New Zealand practice. As I define whole language and examine phonics instruction, I review research on the opposing theories about reading acquisition. I also examine why the dominance of whole language teaching practice in New Zealand is currently being challenged and publicly debated by both academics and politicians but, surprisingly, not by classroom practitioners. Further, as I review the literature I posit the question: Is this debate influencing Dunedin schools to purchase a commercially produced package to implement a systematic approach to teaching phonics?

**Background to the reading wars.**

The distinctive New Zealand approach to teaching reading and writing, known internationally as whole language, began to emerge from the 1970s when the original *Ready to Read* series of core instructional reading texts was revised (Nicholson, 2000a). Influenced by Clay’s (1966) seminal research and her subsequent publications, *Reading: The patterning of complex behaviour* (1979a) and *The early detection of reading difficulties* (1979b), and, in the United States, Goodman’s (1967) article, *Reading: A psycholinguistic guessing game*, New Zealand educators ensured the new instructional texts used language commonly spoken by children, had appealing stories, a high standard of presentation and that they represented the diversity of New Zealand society (Leckie, 1984). The texts were designed to facilitate the use of contextual cues by beginning readers and the pedagogy associated with the revised *Ready to Read* series emphasised the use of contextual cues to make meaning. Thus, both texts and pedagogy were consistent with the central tenet of the whole language approach, namely, that reading is a process of making meaning from text (Ministry of Education, 2003a).

In the period from 1970 to the early 1990s, international reading tests showed that the mean scores of New Zealand students were consistently among the highest of all participating countries (Smith & Elley, 1997). But, in the early 1990s, the first signs that all was not well in
terms of how New Zealand children were taught to read, surfaced. The public debate over reading methods in the 1990s coincided with an onslaught of neo-liberal school reform policies and the ensuing distrust of teachers. The discourse about what Apple (2007) termed “producer capture” (p. 109), that is, the belief that teachers look after their own interests, was widespread. The debate began, as noted by Soler (1999), with a series of New Zealand newspaper and magazine articles expressing “concerns about computer and ‘workplace literacy’” (pp. 530-531), illiteracy among school leavers and university students, and the lowering of the mean scores of New Zealand students in international reading tests. One such newspaper report stated that Professor Tunmer, Dean of Education at Massey University, after investigating the Reading Recovery programme, questioned the way New Zealand children are taught to read, saying “more emphasis needs to be put on traditional methods of linking sounds and letters” (Laxon, 1995, p. 2). According to Soler, other newspaper and magazine articles followed expounding the views of both a small number of academics (e.g., Nicholson) who challenged the current method of teaching reading, and the counter views of those who defended whole language (e.g., Smith and Elley). As a result of such public debates, whole language and the teachers who used that approach were vulnerable and “could be publicly attacked in the press by groups who were not educators or academics” (Soler, 1999, p. 532).

As discussed in the previous section, the radical neo-liberal reforms of the late 1980s made schools self-governing, self-managing and competitive (O’Neill et al., 2004). The core thrust of these reforms was the decentralisation of the governance and day-to-day management of schools, and resulted in a multitude of administrative and financial responsibilities moving from the former central and regional bureaucracies to individual schools (Lange, 1988). At the same time more measures of accountability were put in place. Consequently, principals and teachers were working longer hours; their job was more complex and involved undertaking extra tasks (Wylie, 1999). This may in part explain why the reading debate was dominated by journalists, politicians, members of the public, and a small group of academics: school practitioners were mostly silent. They were preoccupied with the immediate task of keeping their schools and classrooms running in the face of momentous school reform (Wylie, 1999).

In response to public concerns about reading standards the Labour Government established a Literacy Taskforce and a Literacy Experts Group (Soler & Openshaw, 2007). The Literacy
Taskforce (Ministry of Education, 1999b), in investigating how reading is taught in New Zealand schools, found that:

some schools response to the phonics/whole language debate has been to move towards using reading programmes that place a heavy emphasis in teaching subskills in isolation – that is, the ‘skill and drill’ approach - whereas others seem to have moved towards an exclusively whole-language approach with no systematic teaching of phonological awareness. (p. 13)

Consequently, the Literacy Taskforce recommended that teachers receive professional development to enable them select and use a range of appropriate strategies with children.

Further, the Literacy Experts (Ministry of Education, 1999a) in their report recommended a move away from whole language stating:

We do not support the view that beginning reading instruction should focus on teaching children to rely on sentence context cues as the primary strategy for identifying unfamiliar words in text. Rather, greater attention needs to be focussed on the development of word-level skills and strategies in beginning reading instruction. (p. 2)

The Minister of Education rejected this recommendation along with a similar suggestion from the Literacy Taskforce, thus signalling that curriculum control was a government prerogative (Soler & Openshaw, 2007) and the official stance on reading instruction continued to espouse whole language pedagogy. However, the debate about the place of phonics in the teaching of reading in New Zealand schools continued and became increasingly political.

Similar divisive curriculum arguments dominated education debates in Australia, England, Canada, and the United States, provoking the International Reading Association (IRA) to issue a Position Statement on the role of phonics in reading instruction (IRA Board of Directors, 1997; Soler, 1999). The IRA, while emphasising the importance of phonics instruction within a balanced reading programme, expressed concerns at “the exaggerated claims found in the press and other media regarding the inattention to phonics in beginning reading instruction” (A Professional Stance Towards Phonics, para.2) and “the pitting of phonics against literature [i.e., whole language], as if the two are incompatible” (A Professional Stance Towards Phonics, para. 2).
In the United States at that time, when educators were under pressure to “produce measureable results” and when there was “increasing politicization of the reading research and policy agenda” (Pearson, 2004, p. 220), the debate intensified with the publication of the National Reading Panel’s Report (2000). The Panel identified five key areas of reading instruction: phonemic awareness, phonics, fluency, vocabulary and text comprehension. In relation to phonics, the Panel stated: “systematic phonics instruction enhances children’s success in learning to read and that systematic phonics instruction is significantly more effective than instruction that teaches little or no phonics” (p. 9). But the report itself drew widespread criticism. Many researchers and educators including Cunningham (2001), Garan (2001), Pearson (2004), Shanahan (2001), Weaver (2009), and Wyse and Goswami (2008) critiqued the panel’s findings and its decision to select only experimental or quasi-experimental studies. Furthermore, Taylor (1998), in checking the validity of some of the research used by the Panel, revealed that public relations techniques were used to convince policy-makers to recommend a phonics approach to the teaching of reading and argued that “the contention… that children need explicit instruction in phonics is less of a scientific ‘fact’ than an exercise in political persuasion” (p. xxii). This debate subsequently expanded to include arguments about what constitutes “scientific” research, the validity of excluding qualitative research, and the most effective way to teach phonics. In short, the United States debate is no closer to resolution. Rather, it remains politicised and is now broader and more intense.

Likewise in New Zealand, the debate has widened and now includes equity issues. In particular, evidence of the high level of disparity between good readers and poor readers, the so-called “tail”, is now fueling the debate. According to analyses of international reading tests, for example, Progress in International Reading Literacy Study 2001, 2006, the difference between high achieving and low achieving students in New Zealand is large (Greaney, 2003; Tunmer, Nicholson, Greaney, Prochnow, Chapman & Arrow, 2008). Openshaw & Soler (2007) claim that this disparity between literacy outcomes is “the biggest single challenge confronting literacy education in New Zealand” (p. xv). With the majority of readers in the tail coming from low income backgrounds and an over-representation of Māori and Pasifika students this challenge “clearly illustrates how literacy debates often transcend reading, to encompass wider political, social and educational issues” (Soler & Openshaw, 2007, pp. 348-349). Politicians, critical sociologists, Māori academics, members of the public, educators, and researchers in discussing the tail continue to argue how to address the gap.
between good and poor readers in New Zealand. Thus the debate, ignoring the influence of poverty on children’s achievements (May, cited in Blundell, 2012) and focusing on the responsibility of the teacher, has widened to include how schools might address the problem of the tail.

**What is whole language?**

Whole language is a term used to describe a child-centred philosophy of literacy learning that emphasises learning to read by reading (Goodman, 1986). Whole language adherents believe that to understand the parts of any aspect of learning an understanding of the whole is essential (Goodman & Goodman, 1981). Goodman & Goodman encapsulate the essence of the whole versus the part argument explaining that, “a story is easier to read than a page, a page is easier than a sentence, a sentence easier than a word, and a word easier than a letter” (p. 438). This long-held belief that learning should be kept “whole” has implications for literacy pedagogy and instructional texts.

Whole language teachers use a wide range of children’s literature, namely poems, myths, realistic fiction, non-fiction, science fiction, biographies, etc., and, in addition, big books for shared reading, books designed for small group instructional reading as well as children’s writing (Dahl, Scharer, Lawson, & Grogan, 1999; Elley, 1996). They believe that readers do not process all the visual information on a page. Instead, readers sample selective aspects of the print, make predictions and check these using cues to make sense of the text (Goodman, 1989). Goodman (1967) in his influential text, *Reading: A psycholinguistic guessing game*, explained that reading is:

> a psycholinguistic guessing game. It involves an interaction between thought and language. Efficient reading does not result from precise perception and identification of all elements but from skill in selecting the fewest, most productive cues necessary to produce guesses which are right the first time. (p. 127)

Consequently, whole language teachers, rather than isolating discrete skills, teach a range of strategies in context and children learn to use multiple cues as they read checking their predictions by applying prior knowledge, and using meaning, graphophonic and syntactic cues. The New Zealand Ministry of Education (2003a) agrees with Goodman. The handbook, *Effective Literacy Practice in Years 1-4*, distributed to all primary teachers who teach students in Years 1-4, states, “Reading can be thought of as a constantly repeated process of attending
and searching, predicting, cross-checking, and confirming or self-correcting” (Ministry of Education, 2003a, p. 39).

In summary, the whole language approach to teaching literacy rests on four fundamental understandings, namely, that reading is a complex, meaning-driven activity (Braunger & Lewis, 1998; Clay, 1991; Weaver, 2009); that the reader is actively involved in constructing meaning using prior knowledge, graphophonic, semantic and syntactic cues (Goodman & Goodman, 1981; Clay, 1991; Ministry of Education, 2003a); that readers learn to use the four cues in the context of reading real books (Goodman & Goodman, 1981; Clay, 1991; Weaver, 2009); and that instruction is child-centred with effective teachers making decisions based on their knowledge of each child’s learning needs and their knowledge of literacy learning (Ministry of Education, 2003a).

What do the critics of whole language say?
The “multiple cues” theory of reading acquisition is not universally accepted and, indeed, is strongly criticised by some researchers (Tunmer et al., 2008). Adherence to the multiple cues theory, according to Tunmer et al is, for the most part, the reason for the government’s failure to reduce the large disparity between good and poor readers in New Zealand as evidenced by data from the Progress in International Reading Literacy Study (PIRLS) 2006. In place of a whole language approach for children with limited school entry skills they recommend an “explicit code-emphasis” (p. 114) approach to early reading instruction.

Tunmer & Chapman (1993, 2002) argue that relying on the context of the sentence, the word identification strategy favoured in whole language classrooms is ineffective. In their three-year longitudinal study of reading acquisition in whole language classrooms they found that children who used word based strategies (i.e., the use of correspondences between single letters, digraphs, single phonemes, groups of phonemes, and orthographic analogies) showed superior reading performance compared to children who used text-based strategies (i.e., using picture, semantic, and syntactic cues as well as knowledge of the content in the preceding passage).

How do whole language advocates respond?
This critique of the multiple cues instructional approach challenges long-established New Zealand literacy teaching practice based largely on Clay’s substantial longitudinal study of how children learn to read (Clay, 1979a; 1979b). In rebutting Tunmer et al.’s (2008)
challenge, whole language advocates draw on a number of recognised researchers, for example, Braunger and Lewis, (1998), Goodman, (1986), and Weaver, (2009). Further, Clay’s (1991) statement in her in-depth publication on early reading acquisition based on her earlier studies and more recent observations, explains how readers identify unfamiliar words saying:

In efficient rapid word perception the reader relies mostly on the sentence and its meaning and some selected features of the forms of words. Awareness of the sentence context (and often the general context of the text as a whole) and a glance at the word enables the reader to respond instantly. (p. 8)

Do whole language teachers teach phonics?

A common misconception is that whole language teachers do not teach phonics (McNaughton, 1999; Pearson, 2004; Zemelman, Daniels & Bizar, 1999). That particular viewpoint is indeed a misconception. A United States study by Dahl et al. (1999) investigated the nature and efficacy of phonics teaching and learning in eight Grade 1 whole language classrooms. The researchers observed and documented phonics instruction approximately 16 times in each classroom over seven months. They found that the phonics instruction in these classrooms was “systematic in that it was deliberate, planned and intensive” (p. 338). It emphasised not just skills but strategies for using phonics during reading and writing and included instruction in vowels and consonants, root words, compound words, contractions, affixes and homonyms. Children made considerable gains on measures in both decoding and encoding knowledge.

Claims about whether or not New Zealand teachers teach phonics to children beginning to learn to read and write are confusing (McNaughton, 1999). McNaughton identifies three main reasons for the confusion: (i) researchers have made statements about the teaching of phonics in New Zealand schools on the basis of official statements and judgements about good practice rather than research data; (ii) the assumption that any explicit teaching of phonics that takes place during the reading of connected text is incidental; and (iii) there is a lack of clarity about the meaning of the term, “incidental”. Analysing anecdotal and research reports, McNaughton (1999) found evidence that in New Zealand classrooms the emphasis is on embedding the teaching of phonics in the context of reading connected text with some explicit teaching occurring in isolation when necessary. In addition, some explicit teaching of phonics occurs during guided reading and writing. McNaughton noted the absence of New Zealand
studies that produced data about explicit teaching of phonics outside of text reading or writing. Furthermore, an extensive review of the literature since McNaughton’s report reveals that no research has been conducted that produces useful data about what is currently happening in New Zealand classrooms about the systematic teaching of phonics.

What knowledge do New Zealand teachers have about how to teach phonics? Nicholson (1998) cites O’Hare who asserts that trainee teachers receive no instruction in the teaching of phonics (Section: Where to now? Para 8). Could this be because Colleges of Education have taken cognisance of the Minister of Education’s rejection of the Literacy Experts’ (Ministry of Education, 1999a) recommendation to shift the focus for beginner readers from sentence cues to developing word-level skills (Soler & Openshaw, 2007)? Moreover, might teachers, confused by reports in the media from researchers and academics on the teaching of reading and unsure as to how to teach phonics, therefore choose to purchase a commercially produced package such as Jolly Phonics or Letterland to use in their literacy programme?

The role of the teacher.

In light of recent criticisms about whole language (e.g., Tunmer et al., 2008), namely that text-based strategies are less effective when making predictions than word-based strategies, the teacher’s beliefs about early language acquisition and his or her teaching approaches are critical. As Hattie (2003) notes when discussing major sources of variance in students’ achievements, “it is what teachers know, do, and care about which is very powerful” (p. 2). Whole language privileges the role of the teacher as the prime curriculum decision maker (Pearson, 2004). Teachers, with their expertise as “kid watchers” and their extensive knowledge of literacy development, monitor children’s progress and make decisions for individual children (Pearson, 2004, p. 232).

In the United States this position of privilege accorded to teachers has been criticised by those who advocate intensive phonics instruction (Pearson, 2004). These critics support the use of mandated explicit, systematic phonics programmes that encroach on teachers’ position of privilege, namely the right to make teaching decisions. In contrast, New Zealand teachers, using assessment data and knowledge of their students, have been expected to make decisions about how, when, and what to teach each child (Ministry of Education, 2003a). The relative autonomy given to New Zealand teachers means they can utilise pedagogies, learning activities, and resources that they believe will improve their students’ reading (Nicholson, 2000a). In other words, New Zealand teachers, unlike many of their North American
counterparts, have not been constrained by politically imposed pedagogies but have the professional autonomy to create and modify programmes and draw on ideas from both whole language and phonics.

While New Zealand teachers have long enjoyed pedagogical flexibility and being respected as teaching professionals, the second wave neo-liberal curriculum reforms beginning in 1993 progressively impinged on teacher decision-making. Schools, seeking to satisfy multiple demands for student achievement data, and school performance data, implemented *English in the New Zealand Curriculum*, a document Lee et al. (2004) describe as “an outcomes-driven model” (p. 48) of curriculum planning and delivery. This outcomes-based approach fostered a narrow conception of schooling in which teachers implemented rather than created classroom curriculum and where instructional pedagogies predominated. Inevitably this steady erosion of teacher autonomy and respect took its toll with lack of teacher confidence, intensification of teachers’ work, and the de-professionalism of teachers (Lee et al., 2004). Under those conditions, might it be that readymade curricula such as the *Jolly Phonics* and *Letterland* packages provide instant teaching prescriptions for teachers?

**Phonics and Phonics Teaching**

The term phonics refers to the relationship between spoken sounds and the letters that represent them and the use of this system to work out unfamiliar words (Mesmer & Griffith, 2006; Ministry of Education, 2003b). For example, a beginning reader could decode the word *ran* by using his or her knowledge of letters *r*, *a*, and *n* and their associated sounds to articulate each sound and then blending the sounds together. The place of phonics instruction is, along with whole language, the subject of the great debate as to whether children learn better with a beginning method that stresses meaning or with one that stresses learning the code (Chall, 1967). While this debate continues other issues have surfaced.

Among advocates of phonics there is confusion and debate as to the most effective way to teach relationships between letters and sounds (Cunningham & Cunningham, 2002; Hall, 2007; Moustafa & Maldonado-Colon, 1999; Stahl, 2002). For example, should phonics be taught as the need arises during the course of reading or writing, or should instruction follow a prescribed sequence before the reading of connected text? The body of literature related to the teaching of phonics is extensive and includes critiques of the different pedagogical emphases and government policies that mandate the adoption of specific approaches (e.g., Hall 2007; Openshaw & Soler, 2007; Wyse & Goswami, 2008).
Phonics instruction can be explicit, systematic, synthetic, analytic, or embedded (Armbruster & Osburn, 2001; International Reading Association, 1997). Research shows the meanings teachers ascribe to these terms vary considerably. For example, after surveying 382 US primary teachers, Mesmer & Griffith (2005) found teachers employed different terms to describe their instructional phonics practices. Without clear definitions of terms the literature relating to phonics can be confusing.

**Explicit, systematic phonics instruction in the USA.**

In the USA, the federally funded National Reading Panel (2000), after reviewing “scientific” research studies concluded, “systematics phonics instruction makes a bigger contribution to children’s growth in reading than alternative programs providing unsystematic or no phonics instruction (p.2-92 )”. The term, *systematic phonics*, became widely used after the publication of the Panel’s report, a document of national significance, and refers to instruction that “typically involves explicitly teaching students a prespecified set of letter-sound relations” (National Reading Panel, 2000, p. 2-92). It is characterised by the explicit teaching (teachers are provided with precise directions for teaching) of a sequence for learning, beginning with the relationship between sounds associated with single letters and moving on to larger units of written language (Armbruster & Osburn, 2001). For example, children first learn the sounds of the 21 consonants, then the five short vowel sounds followed by three-letter words (comprising an initial consonant, vowel, and final consonant), then consonant blends and digraphs, and finally the five long vowel sounds (Nicholson, 2000a).

**Explicit, synthetic phonics instruction in England.**

In England, the government enquiry into the teaching of reading, known as the Rose Report, recommended that schools adopt a synthetic approach (a form of systematic phonics) to the teaching of phonics, thus sparking controversy and raising concerns about two elements of the report, namely, the relative effectiveness of synthetic and analytic phonics, and the politically driven process that resulted in the promotion of a single specific method (Hall, 2007; Openshaw & Soler, 2007; Wyse & Goswami, 2008). Synthetic phonics, with letter by letter decoding and then blending the sounds to make a recognisable word, emphasises the phoneme, the smallest unit of sound (Hall). Children taught using the analytic approach do not pronounce sounds in isolation (Armbruster & Osburn, 2001). Instead they are taught to analyse letter-sound relationships in previously taught key words.
In relation to the second element of concern, Openshaw & Soler (2007) note that politicians “formed powerful alliances” to ensure the national implementation of “one best method” (p. xvi) to teach early reading skills. This politicisation of the reading debate in England has impacted directly and significantly on both curriculum prescription and teaching practice by “mandating phonics based reading programs, times for and methods of instruction, and intensive testing” (Bishop, 2008, p.2 -3). Further, Exley & Ball (2011), in their examination of Conservative education policies, assert that: “the imposition of strong accountability measures, detailed instruction over what should be taught in schools and a great deal of surveillance imposed from above” (p. 97), all tenets of neo-liberalism, are stark evidence of the politicisation of schooling practice in England.

Clearly, there is a high degree of congruence between phonics instruction as mandated in the USA and England and the model of instruction embodied in many commercially produced packages. Packages, such as Jolly Phonics and Letterland, first developed in England and now used internationally, are marketed as teaching a systematic, synthetic approach. Precise instructions are given for the teaching of letters and their sounds and teaching follows a prescribed sequence. Letters are converted to sounds and then blended together.

**What do the critics say?**

Smith (1999), writing in anticipation of the US Government legislating how teachers should teach reading, argues against systematic phonics instruction saying that, “teaching involves decisions made on the spot, not decisions to move from one instructional goal to the next, but decisions about the condition of the learner” (p. 151), and that drilling children in all “the contingent relationships between sounds of speech and letters of written language before they are readers is a meaningless activity. And once they are readers,…is unnecessary” (p. 152). Allington (2005) is in agreement with Smith (1999) that federal mandating of instructional policies does not work. From his study of exemplary elementary teachers, Allington (2005) noted that these teachers selected multiple instructional approaches and taught “explicitly what they observed their students needed when they needed it” (p. 462).

**The New Zealand approach.**

New Zealand teachers, unlike their counterparts in the US and England, are not mandated to teach phonics using a specific approach. The New Zealand handbook for teachers, *Effective Literacy Practice in Years 1-4* (Ministry of Education, 2003a) states that children need
“deliberate, focused (phonics) instruction” (p. 32). What does this mean? The descriptors, “deliberate” and “focused” are not commonly used in the literature to describe phonics instruction. The teaching examples in *Effective Literacy Practice in Years 1-4*, as well as in the publication *Sound Sense, Teacher Support Material*, (Ministry of Education, 2003b) distributed to schools by the Ministry of Education, provide further information. Both documents endorse embedding phonics instruction in the wider literacy programme. The Ministry of Education (2003b) states:

> Phonics instruction is more effective for children when it links to meaningful classroom literacy experiences…. Limiting children to controlled-vocabulary texts or sticking rigidly to a pre-planned teaching sequence for letter-sound knowledge can mean that opportunities for tapping into the children’s discoveries about language and sounds and extending their awareness into unexpected areas are lost. (p. 7)

With this statement, the Ministry of Education is certainly not advocating a systematic approach to teaching, rather it continues to promote the constructivist approach to reading instruction. Stanovich (cited in Tunmer, Prochnow, Greaney & Chapman, 2007), in discussing constructivism notes that it assumes “that self-discovery is the most efficacious mode of learning, that most learning can be characterized as ‘natural’ and that cognitive components should never be isolated/fractioned during the learning process” (p. 21).

**Conclusion**

In summarising the literature relating to the phonics debate five key points emerge.

One, the debate in New Zealand on the best way to teach reading, in addition to being the subject of research, continues to receive considerable media attention, which in turn generates heightened public and political comment. Invariably the outcome of such ongoing public debates is far reaching (Green, Hodgens & Luke, 1997, p. 8). Green et al. (1997) note that when concerns are “repeated and restated sufficiently, they become part of commonsense, part of the ‘way things are’” (p. 8). Might it be that the repetition of messages from phonics advocates has convinced schools, in a competitive environment, to use a package to systematically teach phonics?

Two, analyses of the Progress in International Reading Literacy Study 2001 and 2006 data show a large disparity between the reading achievement of good and poor readers in New
Zealand. This tail remains and educators, researchers, politicians, and members of the public continue to debate what can be done to reduce the reading achievement gap. Despite evidence of poverty impacting on student achievement, on-going neo-liberal education policies continue to hold teachers responsible for reducing the tail.

Three, there is a significant gap in the literature as to how, in the twenty-first century, New Zealand schools teach reading. There has been no recent New Zealand observational or descriptive research that shows whether teachers continue to adhere to whole language principles and embed phonics instruction or whether they are responding to critics of whole language and teaching children to “sound out” as a first strategy to read unfamiliar words.

Four, throughout the New Zealand debate the voice of primary school principals and classroom teachers have been silent. While politicians, the media, academics, members of the public, and a small group of educational researchers have participated voraciously, practitioners have not entered the public debate. The reason for their silence is not clear. Might it be that after two decades of on-going neo-liberal education reforms, school-based practitioners have lost professional confidence, and/or are simply too busy (Codd, 2005; Day & Smetham, 2009; Galton & MacBeath, 2008)? The intensification thesis (Apple, 2007) supports this probable explanation.

And five, the international debate over the best way to teach reading is ongoing, intense, and highly politicised. As a result of government funded investigations in the USA (the National Reading Panel) and England (the Rose Report), both countries have mandated the adoption of systematic phonics instruction that involves direct teaching of letter-sound relationships in a prescribed sequence. In contrast, the New Zealand Ministry of Education is less directive, and while stating that phonics instruction should be deliberate and focused, has maintained a whole language approach recommending linking phonics instruction to meaningful classroom experiences (Ministry of Education, 2003a; 2003b). That official position notwithstanding, there continues to be uncertainty and confusion as to the teaching of phonics in New Zealand schools. As discussed above, this is in part a consequence of two decades of neo-liberal education reforms, with teachers, working in a competitive environment, facing ever-increasing accountability demands and workload intensification.

Given the nature of the New Zealand reading debate and the demands for greater accountability, the competitive environment, and the recurring strong messages from the
proponents of phonics about the possible cause of the large disparity between good and poor readers, could it be that some schools have decided to purchase a readymade package with a prescribed teaching sequence, prepared lesson plans and resources to implement a systematic phonics teaching programme?

**Section 4: The Professional Development and Learning of Teachers**

A defining characteristic of commercially produced literacy packages is that they provide schools with a prescribed teaching programme. They include details about what to teach, how to teach, and materials for teaching and learning. Schools buy a package having decided they will improve their literacy teaching. Implicit in that decision is the school’s knowledge that the package will provide support in implementing new teaching methodologies. In other words, in purchasing a package a school also purchases professional development. Thus, in my quest to learn why schools use a commercially produced literacy package, a review of the contemporary literature about professional development follows.

This review begins by defining relevant terms, identifying the principal as being the person with responsibility for the school’s professional development (Piggot-Irvine, 2006), and clarifying the rationale for teachers’ professional development and learning. With reference to the work of Timperley, Wilson, Barrar & Fung (2007) and their synthesis of research evidence of what works and why, it explores both the content and the context of effective professional development for teachers.

**How has the professional development and learning of teachers been perceived over time?**

In the course of 13 decades of public education in New Zealand the professional learning of teachers has been variously described as in-service training, professional development, and currently, professional development and learning (Cardno, 2005; Education Review Office, 2009). The emphasis on training as the means whereby teachers were informed of new curriculum and teaching practices lessened in recent decades and instead the processes of development and learning were embodied and implied in the term “professional development”. Whereas in-service training suggested quick, short, and highly focused transmission of knowledge and skills to practising teachers, professional development signalled a more substantial and longer learning process by which teachers developed new understandings, learned about and put into practice new pedagogies. Hoyle (1982) described
professional development as a “relatively new term” that has more meaning than in-service training and seems:

to embrace two ideas in particular. One is the notion of a process starting with initial training, passing through the induction period and continuing throughout an entire career, whereby the teacher continues to develop the knowledge and skills required for effective professional practice as circumstances change and as new responsibilities are accepted. The other is the notion that knowledge and skills should to a greater degree than in the past be more directly related to the substantive problems faced by teachers. (p. 162-163)

A term now used in contemporary literature, professional development and learning, encapsulates the many different ways that teachers learn, acknowledging that they learn from formal professional development as well as from numerous informal activities. For example, teachers learn by reading relevant literature, tertiary study, observing colleagues in practice, receiving feedback from colleagues, study groups, attending conferences, and participating in national professional development projects and school-based professional development (Office of the Auditor-General, 2008; Education Review Office, 2009). In the words of the Education Review Office, the term “professional development and learning’ captures this complexity and reflects the diverse ways in which teachers develop their skills, abilities and approaches for the benefits of students” (p. 4).

Responsibility for the Professional Development and Learning of Teachers

Following the 1989 neo-liberal reforms of the administration and management of New Zealand schools known as Tomorrow’s Schools, responsibility for the provision of professional development for teachers was devolved from national organisations (i.e., the then Department of Education) and regional education bodies (i.e., the then regional Education Board curriculum advisors) to individual schools (Lange, 1988). In addition to being responsible for the appointment of its principal and teachers, and being directly responsible for the day-to-day running of the school, each board of trustees was henceforth required to ensure that its teachers were provided with quality professional development. In practice, the board of trustees delegates this responsibility to the principal (Piggot-Irvine, 2006). The question underpinning this review of the teacher development and learning literature is, might it be that principals, with expanded roles since the introduction of Tomorrow’s Schools (Cardno, 2005), responsible for the school’s curriculum delivery, and for the professional
development of teachers, are attracted to commercially produced packages with their detailed manuals for teaching, and, in the case of some packages, with face-to-face, pre-planned, time-saving professional development programmes?

**Rationale for Professional Development and Learning**

Educators and researchers agree that the purpose of professional development and learning is to change, develop and enhance teaching practices to improve student achievement (Cardno, 2005; Hargreaves & Fullan, 1992; Timperley et al., 2007; Poskitt, 2005). Earl (2007), writing in the International Foreword for *Teacher Professional Learning and Development: Best Evidence Synthesis Iteration*, (Timperley et al., 2007) affirms and extends this stating:

> Many factors influence student learning, but it is increasingly clear that what teachers know and are able to do is one of the most important of all…. Teachers’ knowledge, skills, attitudes and dispositions have direct and serious implications for the success of the students they teach. From this standpoint, professional learning represents an enormous investment in the development of human capital, directed at ensuring that the teaching and learning in our schools is up to date and effective. (p. vii)

Thus, regardless of the focus of the professional development and learning (e.g., to improve the quality of students’ writing), or how it is delivered (e.g., study groups, tertiary study, or teachers talking about their practice, observing each other, and giving feedback), the rationale remains the same. It is to lift student learning by improving teaching.

**Professional development and learning – what works?**

There is an extensive and relatively recent body of literature on teachers learning about their professional work (Hargreaves & Fullan, 1992; Sachs, 2003; Stoll & Fink, 1996;). More recently, and particularly from the 1990s, there has been substantial research activity about the teaching of teachers and what constitutes effective professional development teaching practice, for example, Hargreaves & Fullan (1992), OECD (1998), and Timperley et al. (2007).

Research on adult learners and the professional development of teachers has been instrumental in the development of an increasing number of ways of selecting, organising, and teaching new content and new skills to teachers. Prior to the 1990s, in-service education often:
operated from a ‘deficiency’ model of adult growth. Certain skills – written behavioral objectives, using a new language arts program – are deemed essential for teachers to master by the central administration. Many teachers do not have the requisite skills, so after-school release-day workshops are mandated to remedy the weakness. Staff development takes the form of workshops done to someone by someone else, as in the verb, ‘to in-service teachers’ (Barth, 1991, p. 50)

As the knowledge base concerning how teachers learn expanded, new approaches to teaching and learning have been developed that enable application of sophisticated and evidence-based teaching methodologies, for example, reflective practice followed by collegial discussion (Hargreaves & Dawe, 1990); quality learning circles (Lovett & Gilmore, 2003); and, more recently, teachers engaging in inquiry and knowledge-building cycles (Ministry of Education, 2007; Timperley et al., 2007).

In distilling the key messages of this rapidly growing body of knowledge about professional development, one overarching finding predominates, which is that teachers learn in many different ways. For example, they can learn on their own by reading about research, new ideas, and innovations; undertaking study; reflecting on and refining what they do in their classrooms, and by getting feedback from their students (Hargreaves, 1992). And, they can learn from others who are knowledgeable about teaching, taking courses with colleagues, working alongside a researcher in the classroom, and by participating in appraisal systems and getting feedback from school leaders (Cardno, 2005; Rathgen, 2006). Teachers also learn by examining their students’ work and discussing findings with others (Darling-Hammond, 1997). In addition, Hill, Hawk & Taylor (2002), in analysing data from twelve schools that participated in a New Zealand Ministry of Education development programme, found that teachers learn when they “take risks, make mistakes and engage in honest self-reflection” (p. 12).

**Effective professional development and learning.**

In discussing effective professional development (i.e., the teacher’s professional learning has a positive impact on student achievement), research by Timperley et al. (2007) provides New Zealand and international evidence about what works and why. I make extensive but not exclusive reference to their publication, *Teacher Professional Learning and Development: Best Evidence Synthesis Iteration* (Timperley et al., 2007) when examining specific elements of the content and context of effective professional development that might explain why some
schools are choosing to purchase a commercially produced package to teach part of their literacy programme.

**The content of the professional development and learning.**

Four elements of the content of professional development and learning programmes identified by Timperley et al. (2007) namely, (i) teachers’ pedagogical content knowledge; (ii) the alignment of professional development programmes with school and teacher goals; (iii) the integration of theory and practice; and (iv) the use of assessment to promote learning and focus teaching, proffer possible reasons for schools using a commercially produced package.

**Pedagogical content knowledge.**

Timperley et al. (2007) define the term, pedagogical content knowledge, as “the combination of knowledge that teachers need to have about curriculum content, how to teach it, and how to understand students’ thinking about that branch of knowledge” (p. 283). According to Darling-Hammond (1997), it is essential that teachers understand subject matter and know how to present this effectively to their students. Additionally, Guskey and Yoon (2009), in describing common elements of the nine studies that met the credible evidence standards relating to effective professional development set by the United States What Works Clearinghouse, noted that the “professional development efforts…centered directly on enhancing teachers’ content knowledge and their pedagogical content knowledge. The activities were designed to help teachers better understand both what they teach and how students acquire specific content knowledge and skill” (p. 497).

Similarly, Timperley et al. (2007), when synthesising research on teacher professional development in literacy, found that in all the core studies in this category “considerable emphasis was placed on pedagogical knowledge and/or pedagogical content knowledge” (p. 143). For example, the content in the writing studies was presented at the teachers’ own level and, as learner-writers, they increased their knowledge of the writing process. In one study, teachers in the United States attending an intense summer institute wrote regularly and discussed their work with colleagues. When they returned to their classrooms these teachers applied this model, encouraging their students to share their written work with their peers. Students of teachers who participated in this professional development outperformed students of non-participating teachers (Timperley et al 2007, p. 133).
When teachers do not have sufficient pedagogical content knowledge, what do they do? Is it possible their principals, wanting to address that teaching need, decide to use a commercially produced package that provides details of what to teach and how to teach? For example, if O’Hare’s claim (cited in Nicholson, 1998) that no New Zealand Colleges of Education instruct trainee teachers in the teaching of phonics is still valid, could it be that schools, not having the pedagogical content knowledge in this area, are purchasing a commercially produced package to teach phonics? Further, are teachers, like those in Timperley et al.’s (2007) synthesis, lacking pedagogical content knowledge in writing? And, as a consequence, might it be that schools employ a commercially produced writing package (e.g., Words Alive) to provide teachers with knowledge of how to teach writing?

**Aligning programmes with school and teacher goals.**

If professional development is to be effective then it must meet the needs of teachers and it “should be consistent with teachers’ goals, addressing real and daily concerns, and build on earlier experiences and learning” (Hill et al., 2005, p. 12). This alignment of teachers’ needs and their goals occurs when planning for professional development and learning is informed and shaped by information from the school’s appraisal system that identifies teachers’ professional strengths and professional development needs, and the school’s self-reviews that analyse student achievement data and generate long term school goals and priorities (Cardno, 2005; Education Review Office, 2009). The Education Review Office (2009), in discussing schools with high quality professional development and learning, noted that, “Schools that had used their internal review processes to established school-wide and targeted priorities had planned carefully to meet these” (p. 17). Thus, might principals, having engaged in a school curriculum review involving the analysis of student achievement data and the subsequent identification of school goals, decide to implement a specific commercially produced package (e.g., Sounds Alive to teach students about letters and sounds) school-wide for the purpose of building teacher knowledge and lifting student achievement to meet those school goals?

In addition to using the school’s appraisal system to identify school learning priorities, individual teacher or syndicate learning goals can be discovered through a series of inquiries during which teachers examine the effectiveness of their teaching and identify the knowledge they need to plan and implement programme changes (Annan, 2009; Education Review Office, 2009; Ministry of Education, 2007). These inquiries lead teachers to “identify important issues, become the drivers for acquiring the knowledge they need to solve them,
monitor the impact of their actions, and adjust their practice accordingly” (Timperley et al., p. xlii). By engaging in an “inquiry and knowledge building cycle” (Timperley et al., p. xliii), teachers’ professional learning is directly related to their students’ achievement and the impact of their teaching. According to Houston (cited in Darling-Hammond, 1997), when teachers conduct inquiries into the impact of their teaching on students’ learning they come to understand teaching “to be an inherently problematic endeavor, rather than a routinized activity” (p. 322). With these findings in mind, might teachers and principals, having inquired “into the impact of their teaching on their students” (Ministry of Education, 2007, p. 35) and, investigated strategies for helping their students, decide to purchase a commercially produced package they consider will address the learning needs of their students?

**Integrating theory and practice.**

When teachers are going to implement instructional methods that are substantially different from what they have been using, then professional development programmes ought to include both theory and pedagogy (Darling-Hammond, 1997). And, when the content of professional development programmes includes opportunities for teachers to understand the theory and transfer those understandings to classroom practice the ensuing learning is at a deeper level (Poskitt, 2005). Further, this deep learning enables “teachers to examine the values and beliefs that underpin their practice” and, with that deeper understanding, they are thus better able to “alter their ways of thinking and doing” (Hill et al., 2002, p. 12). Moreover, research shows that professional development initiatives which present information about preferred practice without providing theoretical knowledge are ineffective in changing teachers’ practices and lifting student outcomes (Timperley et al., 2007).

Taking into account Hill et al.’s (2002) conclusion about deeper understanding, might it be that schools, seeking to improve their literacy teaching, implement a commercially prepared package and its accompanying face-to-face, pre-planned professional development programme with the expectation that it will “alter their ways of thinking and doing” (p. 12)?

**Using assessment to promote learning and focus teaching.**

Assessment is an integral part of the teaching and learning process and is used to identify the next teaching steps, as a tool for reflecting on the effectiveness of teaching practice and to motivate teachers to engage in professional development (Timperley et al., 2007). Crooks (2011), in discussing assessment for learning, identifies three key components: “having a
clear goal; identifying gaps between what a student can currently do and the goal, and identifying steps or strategies to close the gap” (p. 72).

Might it be that some schools, having assessed their students’ learning, and uncertain of where to go next, have purchased a package and used the package’s manual or the pre-planned professional development programme to implement the next prescribed teaching steps for their students?

**The context of the professional development and learning.**
Three aspects of the contexts within which teachers’ professional development occur are discussed, making reference, as discussed earlier, to the work of Timperley et al., (2007). They are: (i) having extended time to understand new ideas and to transform these into classroom practices; (ii) having input from an expert external to the group who is able to engage teachers in learning, challenge teachers’ existing beliefs, and present discrepant information; and (iii) having a school leader who actively supports professional development and learning. Each of these aspects might provide a possible explanation as to why some schools choose to purchase a commercially produced package to teach part of their literacy programme.

**Extended time.**
Substantive new learning resulting in change to teaching practice requires time (Guskey & Yoon, 2009; Poskitt, 2005; Timperley et al., 2007). The process of challenging teachers’ existing beliefs, values and understandings and eventually changing teaching practice is iterative rather than linear and consequently takes time. Moreover, teachers need time to think deeply about their practice, analyse student work, reflect on and revisit new ideas (Guskey & Yoon; Poskitt, 2005; Timperley et al., 2007).

The curriculum content of teachers’ professional development has direct and obvious implications for the amount of time required for successful learning outcomes. Core curriculum areas are both deep and complex (e.g., reading, writing, mathematics) and therefore generally require considerably more time than discrete and relatively self-contained areas (e.g., road safety, handwriting and spelling) (Timperley & Alton-Lee, 2008; Timperley et al., 2007). In these cases, distinctions need to be made between deepening curriculum knowledge and emphasising a new approach to teaching (Timperley & Alton-Lee, 2008). Professional development initiatives spanning extended periods of time (e.g., two to five
years) and involving frequent meetings of teachers and facilitators (e.g., weekly or monthly meetings) are not unusual (Darling-Hammond, 1997; Timperley et al. 2007).

Poskitt (2005) surveyed teachers as to their perception of the ideal duration of a professional development programme and found most teachers thought that two years was necessary, the first year to learn about the content and process and the second year to refine and embed skills. Hill et al. (2002) found that a number of the New Zealand primary, intermediate, and secondary schools they were working with went even further than those in Poskitt’s study. Those schools chose to reject a 12-month professional development plan and instead strategically planned a professional development cycle of three years: one year to review and challenge existing practices, the following year to implement changes and, the third year to embed, or institutionalise, the changes.

Might schools, focusing on improving literacy teaching and learning and knowing that school-wide change will require a substantial period of time to learn, implement and embed new practices and understandings, therefore purchase a package (e.g., Words Alive) which provides substantial in-school learning support and prolonged teacher professional development?

**External expertise.**

Traditionally, professional development in New Zealand primary schools includes an external expert from a university, or a Ministry of Education or private facilitator (Education Review Office, 2009; Lovett & Gilmore, 2003; Poskitt, 2005; Timperley et al., 2007). The outside expert is expected to provide theoretical input and have a high level of domain-specific knowledge (e.g., a reading advisor or a university lecturer with research interest in language acquisition), to be able to challenge teachers’ existing assumptions and to facilitate teachers’ learning (Timperley & Phillips, 2003; Timperley & Robinson, 2001). Corcoran (cited in Guskey & Yoon, 2009), noted that without the input of an external expert teachers “paid lip service to the use of research” and were “more interested in designs that drew on research about practices that they already felt were ‘good’ than in designs that were producing results” (p. 496).

In addition to the domain-specific knowledge, to be effective the external expert requires a number of other attributes, including knowing the teachers’ beliefs about how children learn, and being able to make connections between the new knowledge and the teachers’ actual
classroom situations. The Education Review Office’s (2009) report on professional development in New Zealand schools noted that, “The most effective facilitators modelled classroom practice, provided ongoing instruction and guidance, observed teachers in their classrooms and gave constructive and supportive feedback” (p. 31). A further finding about the attributes of effective experts concerns their willingness to provide time for teachers to assimilate and integrate new knowledge as they begin to make changes to their teaching practice. External experts who expected teachers to quickly implement the preferred practices were less effective than those who worked in iterative ways allowing time for teachers to discuss the implications of new learning for their classroom practice (Timperley et al., 2007). In addition, Timperley et al. (2007) caution that the impact of external experts who “present prescribed practices to teachers” (p. xxvi) might be limited when the expert withdraws.

With a number of commercially produced packages having been developed to teach a discrete aspect of literacy, for example, phonics, could it be that schools are using these packages as substitutes for an external expert to inform teachers and to provide pedagogical content knowledge in the teaching of phonics? Furthermore, are principals and teachers regarding the package developer/professional development deliverer as an expert whom they believe will provide a high level of knowledge about the teaching of writing (e.g., Words Alive) and facilitate teachers’ learning?

**Effective school leadership.**

In New Zealand schools, it is the principal more than any other person who is expected to provide effective leadership for the professional learning of the school’s teachers (Cardno, 2005; Fullan & Hargreaves, 1992; Piggot-Irvine, 2006; Stoll & Fink, 1996; Timperley et al., 2007). The Education Review Office, the statutory school audit authority, deemed the role of the principal in a school’s professional development programme as being pivotal. In identifying significant differences between New Zealand primary schools with high quality professional learning and development and schools that do not have professional learning of such calibre, the Education Review Office (2009) reported that the quality of the principal’s leadership and management of the professional development was what largely accounted for the difference.

Principals of schools with high quality professional development and learning share a number of attributes including having a vision on how teaching affects student learning, communicating their vision for professional development with the board of trustees and
teachers, working with the board to secure funding and resources, collaborating with school leaders to plan and implement professional development and sharing the leadership with others (Education Review Office, 2009).

In addition, effective principals develop a culture of learning within their school. They often actively participate in the professional development, know what content and learning activities are likely to benefit teachers, have an in-depth knowledge of theory, and understand how theory can be put into practice (OECD, 1998; Timperley et al., 2007). In summary, researchers, school auditors and professional development facilitators agree on the critical role of the principal in planning, developing, and managing the school’s professional development and learning.

Might it be that principals, seeking to develop a culture of learning, are purchasing a package with a readymade professional development component, implementing this across the school, and, in so doing, are reassured that they are facilitating and managing school-wide professional development?

**Conclusion**

An examination of the body of literature relating to teachers’ professional development and learning reveals a consistent and recurring understanding, namely, that the sole reason for professional development is to lift student learning by improving the quality of teaching. Further, high quality professional development and learning initiatives embody a number of best-practice, research-supported characteristics. These include programmes focusing on teachers’ pedagogical content knowledge; aligning the content of professional development and learning programmes to school and teacher goals which are informed by the analysis of student achievement data; integrating theory and practice; using assessment to promote learning; allowing extended time to learn new pedagogies and embed these in practice, having a facilitator with high domain knowledge and ability to facilitate teachers’ learning, and a principal who shares his or her vision for the professional development with teachers and is actively involved in the learning.

Might the decision of schools to purchase and use a commercially produced package to teach an aspect of their literacy programme be in some way influenced by best-practice characteristics of effective professional development such as the use of an external expert
(i.e., the package developer), the alignment of content to school and teacher goals and the opportunities to learn new pedagogical content knowledge?
Chapter Three: Methodology

This chapter describes the methodology of my research. I begin by discussing the development of the study, justifying the methods used to answer the research questions, explaining my role as researcher, and describing the participants and their selection. I then discuss ethical considerations and steps taken to ensure that participants were treated respectfully. Finally, I explain the development of the data collection tools, namely the questionnaire and the interviews, and the analysis of the data.

The Study

This study investigated a relatively new and growing phenomenon, the use of commercially produced literacy packages in New Zealand primary schools. It sought to answer two research questions:

1. How widespread is the use of commercially produced literacy packages in Dunedin primary schools?

2. Why do schools choose to use commercially produced packages for the teaching of literacy?

The genesis of the study was anecdotal reports suggesting the use of these packages in primary schools was widespread. To date there has been no New Zealand research about the extent of this phenomenon but if it is widespread then it would suggest that the use of commercially produced literacy packages heralds a change in the way literacy is taught.

In the development of my study I was guided by Crotty’s (2003) framework of four related research process elements, namely, epistemology, theoretical perspective, methodology, and methods. I discuss how each element informed the next.

Epistemology.

My epistemological stance, that there is not one objective truth as to why schools choose to purchase and use a literacy teaching package, influenced my choice of paradigm, methodology, and methods (Carter & Little, 2007). I believed there were likely to be many realities, many truths: the world of schools and those who work in them is “not governed by regularities that hold law-like properties” (Snape & Spencer, 2003, p. 23). In seeking answers
to my research questions my main concern was uncovering and understanding the thinking of school principals about literacy learning, literacy curriculum and the teaching of literacy (Cohen et al., 2007). Consequently, in order for my research data to be trustworthy and authentic (Patton, 2002) I needed to investigate and explore those understandings.

**Theoretical perspective.**

In seeking to understand the thinking and decisions of school principals the study was set within an interpretivist theoretical perspective or paradigm (Lather, 2006). I sought to comprehend the possibly diverse reasons why schools would purchase a commercially produced literacy package and to uncover “hidden…underlying social forces” (Fossey et al., 2002, p. 719) that could impact on the decisions of school principals. In discussing interpretative researchers, Cohen et al. (2007) explain that they “begin with individuals and set out to understand their interpretations of the world around them. The data thus yielded will be glossed with the meanings and purposes of those people who are their source” (p. 37). It was this focus on seeking to understand the thinking of principals that governed my choice of methodology and methods.

**Methodology.**

The study utilised a phenomenological methodology (Cohen et al. 2007). In the words of Lichtman (2006), phenomenology as a method “looks at the lived experience of those who have experienced a certain phenomenon” (p. 70). Bogdan and Biklen (2003) contrast phenomenology with research that aims to find facts explaining that phenomenologists do not assume knowledge of the meaning participants attribute to the phenomenon being studied. In other words, “phenomenological inquiry begins with silence” (Psathas, cited in Bogdan & Biklen, 2003, p. 23). Therefore, in maintaining consistency with phenomenological methodology, I began by not assuming knowledge of why principals used commercially produced packages. Furthermore, the methodology for my study involved gathering data about the purchase and use of literacy teaching packages from those who made the decision, namely, the school principals. I sought to uncover their “truths” believing that reality is in “the eyes and minds of the beholders” (Weirsma & Jurs, 2009, p. 274), that is the school principals.
Methods.
The last of Crotty’s (2003) four process elements is method. Answering my two research questions required different research methods. In seeking answers I collected and analysed both descriptive and rich textual data. I used “different forms of evidence to build greater understanding and insight of the social world than is possible from one approach alone” (Snape & Spencer, 2003, p. 22). Answering the first question involved the collection and analysis of descriptive data about the number of schools using a package. The second question explored the reasons schools chose to use a commercially produced package to teach part of their literacy programme. That question required the collection of rich textual data to reveal the depth and scope of principals’ reasons for adopting a change to their teaching of literacy.

My Role As Researcher
Lichtman (2006), in describing the critical role the researcher plays in the qualitative research process, states that, “It is through his or her eyes that data are collected, information is gathered, settings are viewed, and realities are constructed” (p. 12). As explained in Chapter One, in undertaking this study I was driven by a desire to discover why schools were perhaps changing from the established practice of developing their own class programmes to purchasing a readymade package to teach an aspect of literacy. I wanted to find out what was behind this phenomenon. As I planned my study, and while collecting, analysing, and reporting data, I assumed a stance of “empathic neutrality” (Patton, 2002, p. 53) with regard to the use of commercially produced literacy packages in Dunedin primary schools. I was not marketing or promoting the use of any package, I was not judging any teacher or school for using a package, and I was not espousing or advocating a particular literacy teaching philosophy. Rather, I wanted to understand the multiple perspectives about package usage as they emerged.

In adopting a reflexive stance I engaged in “navigating multiple research identities” (Ballinger, 2003, p. 66). As a former teacher and principal in the same city as the principals participating in this study, I had worked alongside them, shared many understandings about teaching, learning, leadership, management issues, and workload demands. We thus had similar histories and spoke a common language. I needed therefore, as a researcher, to engage in what Macbeth (2001) calls “positional reflexivity” (p. 38). Lichtman (2011) describes this type of reflexivity stating “A researcher looks at place, biography, self and other as they
influence the analysis” (p. 288). In other words, in identifying my multiple identities and the connections I had with the study’s participants and in turning “a critical gaze towards” myself (Ballinger, 2003, p. 3), I became more aware of how identities and connections could impact on my gathering, analysis, and interpretation of the data. For example, when interviewing principals I was aware that I brought my knowledge of the principals’ world to the questions I asked and to the way I responded to their answers, and through reflexivity I questioned whether I assumed knowledge of what principals said or whether I sought clarification (Finlay, 2003). Was I privileging my knowledge over that of the principal? As Hertz (cited in Finlay, 2003) argues “researchers are ‘imposed’ at all stages of the research process – from the questions they ask to those they ignore, from problem formulation to analysis, representation and writing” (p. 5). Thus, being reflexive enabled me to identify how my professional background and my positioning impacted on the research process.

**Participants**

The participants were the principals of 42 Dunedin primary schools. The schools encompassed all Dunedin primary schools in the West Cluster, South Cluster and North Cluster areas of the city, so-named for educational administrative purposes, for example, the management of Resource Teachers of Learning and Behaviour. Just three schools on the very southern fringe of the city were not included: these schools, along with schools in Mosgiel and surrounds, are part of what is known as the Taieri Cluster.

The participating schools comprised state and integrated schools (i.e., schools with a designated special character which have entered into an Integration Agreement with the Minister of Education), inner city, rural and suburban schools, full primary, contributing, and a composite school with separate primary and secondary sections. (Note: data pertaining to the primary section only of that school was gathered and analysed.) The size of the participating schools varied considerably with almost two thirds being small with rolls less than 150 (i.e., U1-U3). (Each New Zealand state and integrated primary school is given a school-size ranking known as the U grading by the Ministry of Education based on the school roll number, e.g., a U1 school has between 1 and 50 students; U2, 51-100; U3, 101-150; U4, 151-300; U5, 301-500.) Similarly, school community socio-economic measures also varied.
(This measure, known as the school’s decile rating, reports each school community’s socio-economic standing with decile 10 being the most affluent.) The participating schools had decile ratings ranging from decile 2 to decile 10. School based variables (e.g., U grading, decile rating, and school type) are summarised in Table 1.

Table 1:
Details About Participating Schools Based On Information Provided By The Ministry of Education, December 2010 & August 2011

<table>
<thead>
<tr>
<th>Decile rating</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of schools</td>
<td>4</td>
<td>4</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>4</td>
<td>9</td>
<td>4</td>
<td>8</td>
<td>42</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>U grading (School size)</th>
</tr>
</thead>
<tbody>
<tr>
<td>U1</td>
</tr>
<tr>
<td>Number of schools</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type of school</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full primary</td>
</tr>
<tr>
<td>Number of schools</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State/Integrated schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>State</td>
</tr>
<tr>
<td>Number of schools</td>
</tr>
</tbody>
</table>

* Although this school had a secondary department, only the primary school participated in the study.

Ethics

In developing an ethical research design I determined that the “ethics of research must permeate every phase of the…process” (Denzin & Lincoln, 2000, p. 18). I was conscious that,
without consideration for the participants, there was the potential for ethical problems. Given that this study was investigating reasons schools chose to purchase and use a commercially produced literacy package, data from principals needed to be managed with care and sensitivity (Cohen et al., 2007). For example, if the principal, in discussing reasons for purchasing a commercially produced package, disclosed concerns about the performance of a specific teacher, or teaching syndicate, it was critical that I ensured this information remained confidential and that the principal, the teachers, and, indeed, the school, were all protected from harm. I needed to be an “ethically sensitive” researcher throughout this study from its genesis to the reporting of the findings (Soltis, 1990, p. 251).

Furthermore, in designing, conducting and reporting this research I took cognizance of the words of Soltis (1990) who emphasised interactions are not with “subjects” but with “real people who deserve respect as persons and who require me to recognize their claims for ethical treatment” (p. 250). The principals, teachers, and other members of the schools with whom I interacted were at all times respected.

I complied with University of Otago ethical obligations. All participants were provided with information (orally and in writing) about the purpose and nature of the study and what they were being asked to do on two occasions, (a) when receiving the questionnaire and (b) before taking part in the interview. Thus, each participant’s involvement was voluntary and his or her consent was informed. Further, participants were advised they could withdraw from the study at any time without disadvantage.

To maintain confidentiality and to protect their anonymity I assured participants that the name of the principal and that of the school would not be disclosed and that no identifying information would be reported. Participants were given an envelope in which they could seal their completed questionnaire. When analysing and reporting data, schools and principals were assigned code numbers.
**Data Collection**

Data collection occurred in two phases. The first phase involved using a questionnaire to survey all 42 schools, and the second phase, three months later, entailed interviews with eight principals.

**Questionnaire.**

**Development of the questionnaire.**

The advantage of a questionnaire was that I could ask all participants in the population the same set of questions and that principals could choose when to complete it (Burns, 2000). The purpose of the questionnaire was to collect demographic data from all participants about their current and or past use of a commercially produced package for the teaching of literacy, the names of package(s) they were using or had used, and to collect data about participants’ insights about aspects of teaching and learning related to the use of commercially produced literacy packages. In using a questionnaire I assumed that principals were “both willing and able to give truthful answers” (Burns, 2000, p. 571).

I worked through the following steps in the development of the questionnaire. First, I brought together a “pilot group” of five educators and sought their assistance in developing, trialling and delivering a questionnaire. This pilot group comprised three recently retired principals, one recently retired literacy specialist, and an ex-teacher now teaching at a tertiary institution. Two of the three principals had retired from a school that used a package and no one was a member of the population I intended to survey. I initially discussed the study with them to clarify terminology, (e.g., commercially produced package), and later called on their help in trialling a draft of the questionnaire.

**Constructing the questionnaire.**

In constructing the questionnaire, four elements warranted careful consideration, namely, (i) the framing of the questions, (ii) clear instructions denoting the sequence of questions, (iii) the instructions for answering questions, and (iv) the format of the questionnaire document (Burns, 2000; Cohen et al., 2007). I decided to use both closed and open-ended questions, for example, Is this school currently using a commercially produced package for the teaching of literacy? (closed) and, Often school practitioners develop insights about aspects of teaching and learning that researchers have not considered. Is there anything you would like to share.
about the use of a commercially produced package for teaching literacy? (open-ended). While answers to closed questions (e.g., yes; no; don’t know) would elicit discrete pieces of information, responses to open-ended questions would enable me to “understand the world as seen by the respondents” (Patton, 2002, p. 21). Instructions for completing the appropriate section and for answering questions were kept simple (e.g., If ‘YES’, proceed to page 2 and complete questions in Section One only (i.e., the blue pages); and, (Please tick boxes that apply). The questionnaire was divided into three sections with each section produced on different coloured paper. See Appendix A: Copy of Questionnaire.

**Trialling the questionnaire.**

My intention was to construct a questionnaire that was both user-friendly and time-efficient with reference to the professional lives of principals. And, in trialling the questionnaire I wanted to ensure that the questions would elicit useful data about commercially produced literacy packages, that there would be no ambiguity, no unfamiliar jargon, and that the instructions and directions were clear (Burns, 2000; Cohen et al., 2007). Each member of the pilot group was given two copies of the draft questionnaire along with a covering letter explaining that the aim of the trial was to ensure the questions and directions in the questionnaire were “crystal clear”. Members were given two imaginary scenarios and asked to complete each draft questionnaire from the perspective of the principal in each scenario (e.g., You are the principal of a school that is currently using a commercially produced literacy package; or, You are the principal of a school that is not currently using a commercially produced package to teach literacy but used one in the past). See Appendix B: Copy Of Letter To Pilot Group Re Trialling Draft Questionnaire.

Members of the pilot group wrote comments alongside questions and directions on the draft questionnaire and this feedback was summarised. One member wrote that the questionnaire was “Easy to follow, the questions are very clear”. Another member said that it was “Very straightforward for those reading it”, while a third member, in discussing the organisation of the questionnaire, stated that “All ‘chains’ or links work well”. Five amendments (an additional instruction; a change to the directions for moving from Q.1 to Q.3; changes to the wording of particular questions) were made to the final questionnaire. See Appendix C: Feedback From Trial Questionnaire.
Distributing the questionnaire.

Achieving a high rate of participation and ensuring principals were fully informed as to the nature and purpose of the study were of prime importance when considering a method to distribute and collect questionnaires. In consultation with the pilot group the decision was made to deliver the questionnaire in person rather than by post. There were several advantages in using this method. It enabled a face-to-face meeting with each principal and an opportunity to give an explanation of the study, the research questions and the collection of data. Further, it enabled principals to raise concerns and ask questions.

It was intended that three assistants would help with delivering the questionnaire. None of these assistants had any links to schools being surveyed. Packs were collated for assistants to deliver each questionnaire to their designated principals. Included in each pack were copies of the questionnaire, consent forms approved by the University of Otago, envelopes for ensuring the completed questionnaire remained confidential, and a sheet entitled Procedures For Delivering Questionnaires to Schools. Assistants were given instructions verbally and in writing on what to say at their first meeting with principals about the purpose of the questionnaire and how to complete it, and on negotiating arrangements for collecting or returning the completed questionnaire. See Appendix D: Procedures For Delivering Questionnaires To Schools.

Note: because of unforeseen events in the lives of two of the distribution team (death of a spouse and sudden illness), only two people delivered the questionnaires, one assistant and me.

The first contact with all 42 Dunedin primary school principals was an unscheduled visit to the school. The timing of this visit was carefully judged taking into account whether the principal was a “teaching principal”. For schools where principals were also teaching students, the visit was timed for either before 8.00am, at lunchtime, or after school. For non-teaching principals the visit was after 9.30am. When the principal was not able to meet to discuss his or her participation in the research an alternative meeting date and time was arranged. This approach worked well with 45% of the meetings with principals occurring on the first visit. At the conclusion of the first meeting, each principal was formally asked if he or she consented to participate in the questionnaire. Additionally, arrangements were made for the return or collection of the completed survey.
Table 2:

Number Of Visits To Schools To Meet With Principals About The Questionnaire

<table>
<thead>
<tr>
<th>Number of visits</th>
<th># of schools</th>
<th>% of schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>One visit</td>
<td>25</td>
<td>59%</td>
</tr>
<tr>
<td>Two visits</td>
<td>15</td>
<td>36%</td>
</tr>
<tr>
<td>Three visits</td>
<td>2</td>
<td>5%</td>
</tr>
<tr>
<td>Totals</td>
<td>42</td>
<td>100%</td>
</tr>
</tbody>
</table>

Return of completed questionnaires.

Arrangements were made with each principal for the return of completed questionnaires. Thirty-eight principals accepted the offer for someone to call at the school on a prearranged date to collect the completed questionnaire and four opted to use the provided stamped addressed envelope. This approach worked well with 90% of completed questionnaires being collected or returned within two weeks.

Table 3:

Number Of Days To Collect Or Receive Completed Questionnaires

<table>
<thead>
<tr>
<th>Number of days to collect or receive completed questionnaires</th>
<th># of schools</th>
<th>% of schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-7 days (1 week)</td>
<td>19</td>
<td>45.0%</td>
</tr>
<tr>
<td>8-14 days (2 weeks)</td>
<td>19</td>
<td>45.0%</td>
</tr>
<tr>
<td>15-21 days (3 weeks)</td>
<td>2</td>
<td>5.0%</td>
</tr>
<tr>
<td>22-28 days (4 weeks)</td>
<td>1</td>
<td>2.5%</td>
</tr>
<tr>
<td>29-35 days (5 weeks)</td>
<td>1</td>
<td>2.5%</td>
</tr>
<tr>
<td>Totals</td>
<td>42</td>
<td>100%</td>
</tr>
</tbody>
</table>
All questionnaires were returned. I attribute the 100% return rate to a number of factors, namely, that the method of delivering the questionnaires in person, rather than by post, gave principals opportunities to learn about the study and how to complete the questionnaire. That initial face-to-face contact was highly interactive with most principals asking questions about the questionnaire and the study. Additionally, at that initial meeting the principal decided how the completed questionnaire would be returned. Further, the questionnaire was user-friendly and did not take a lot of time to complete (Burns, 2000).

**Interviews.**

The purpose of the interviews was to gather in-depth information (Ary, Jacobs & Sorenson, 2010) about the use of commercially produced literacy packages from a sample of eight principals, four of whom were at schools currently using a package. In achieving two samples of principals to interview (i.e., principals who used a package, and principals who did not use a package), I worked through the following three steps based on a synthesised version of the work of Patton (2002), and Ritchie, Lewis, & Elam, (2003). Firstly, I eliminated the names of the 12 principals who in their completed questionnaire indicated that they had no more to say about the use of commercially produced packages (i.e., they answered ‘no’ to the open question, Is there anything you would like to share about the use of a commercially produced package for teaching literacy?). My reason for doing that was that I wanted to interview principals who had opinions, ideas, and insights into the use of commercially produced packages in literacy programmes, and were more likely to provide rich textual data. Secondly, from a list of the remaining 30 principals, all of whom did respond to the open question, I formed two lists of schools, (i) those schools that were using a package, and (ii) those schools that were not using a package. Finally, I then randomly selected four names from each list. All principals of those eight schools were willing to participate in an interview. Details about the schools whose principals participated in an interview are summarised in Table 4. The information about the two groups (i.e., those who use a package, those who do not use a package) has been collated to ensure anonymity for each school.
Table 4:

Demographic Data Of Schools Whose Principals Participated In Interviews Based On Information Provided By The Ministry Of Education, December 2012 & August 2011

<table>
<thead>
<tr>
<th>Demographic data</th>
<th>Schools</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Using a package</td>
<td>Not using a package</td>
</tr>
<tr>
<td>Decile rating</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Low Decile (1-3)</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Medium Decile (4-7)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>High (8-10)</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>U grading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small (U1-U2)</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Medium-small (U3)</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Medium-large (U4)</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Type of school</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributing</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td>Full primary</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

**Development of the interview.**

In preparing the content of the interviews I first analysed responses from the questionnaires and identified four frequently recurring themes, namely, (i) consistency in teaching methods across the school, (ii) professional development, (iii) meeting school targets, and (iv) the influence of other schools on decisions to purchase a package. Wanting to explore those themes in more depth and learn more about the meaning that each principal constructed from them, I developed a broad, open question about each of them (Bogdan & Biklen, 2010). A fifth question explored principals’ thinking and opinions about a possible move away by an increasing number of schools from accepted New Zealand practice of schools developing their own literacy curriculum to schools purchasing part of their literacy curriculum from an outside developer. The last question (i.e., the sixth) was open (Ary, Jacobs & Sorenson, 2010) and gave principals an opportunity to share any further ideas about the use of commercially produced packages in the teaching of literacy.

Each of the first four interview questions was preceded by information gathered from the questionnaire of Dunedin schools. My purpose in doing this was twofold; (i) to make a
connection for the principal between the phase one data collection and this interview process, and (ii) to exchange some of the information collected from the questionnaire with these principals who had contributed and were continuing to share their opinions and insights (Legard et al., 2003). Smith (2010) describes the process of sharing information with participants as an element of respect. She calls it “manaaki ki te tangata” (p. 102) and cites Cram’s (2001) translation of this as, “A value that underpins a collaborative approach to research, one that enables knowledge to flow both ways and that acknowledges the researcher as a learner and not just a data gatherer or observer” (Smith, 2010, p. 102). In addition, I used the questionnaire data as a stimulus to what I hoped would be an in-depth discussion. For example, with question two of the interview I explained that 42% of schools using a package commented positively on the professional development that was provided by the developer or publisher of the package they are using. I then asked the question, Thinking back to when this school decided to use a package for the teaching of literacy, did the provision of professional development by the package provider or producer influence your decision to purchase the package? See Appendix E: Interview Questions.

**Conducting the interviews.**

Although a set of questions was prepared beforehand to ask the principals, other questions emerged during the dialogue between the principal and me (DiCicco-Bloom & Crabtree, 2006). As principals answered the questions they provided examples, gave detailed descriptions of school situations, and introduced other topics into the discussion. Freebody (2003), when discussing interviews with prepared and open questions argued that they:

> Aim to have something of the best of both worlds by establishing a core of issues to be covered, but at the same time leaving the sequence and the relevances of the interviewee free to vary, around and out from that core. (p. 133)

Different types of probes were used (Legard et al., 2003), namely, to encourage principals to elaborate further, (e.g., “So what sort of data do you get from the package?); to seek explanations (e.g., “So you’ve used the exemplars and the headings in those, what are you doing differently now?”); and to clarify meanings (e.g., “Am I correct in what I understand you are saying? You commenced using the package having identified writing as something you needed to work on?”).
The interviews took place at a time and location negotiated with each principal and with one exception were conducted at the principal’s school. At one interview the principal included two teachers with responsibility for the implementation of their packages as co-participants. Before commencing interviews I sought permission from each principal to use both a digital recorder and, as a backup, a tape recorder. The transcripts of the interviews included all comments from the interviewees as well as my questions and prompts (Bogdan & Biklen, 2003).

**Analysis of Data**

**Questionnaire.**

Two types of data were collected from the questionnaire, namely, descriptive data from the closed questions about the usage of commercially produced literacy packages, and rich textual data from the open questions that explored principals’ opinions, ideas and insights about teaching packages and their reasons for using or not using packages (Punch, 2009).

**Analysis of data from questionnaire.**

The analysis of the descriptive data from the questionnaire involved counting the number of respondents who indicated that their school (i) was currently using a commercially produced literacy package, (ii) was not currently using a commercially produced literacy package, and (iii) had used a commercially produced literacy package at some stage in the previous four years but was not currently using one. The numbers were converted to percentages. Demographic information about the schools was noted (e.g., the decile rating, the U grading and the school type) and taking those four school variables into account, patterns of package usage were identified.

I also collected information about the names of the commercially produced packages that schools used and which year levels used the packages. I listed these data counting the number of schools using each package and noting the year levels each school used their package(s) with.

When completing the questionnaire all 26 principals who used a commercially produced package wrote either a single statement or several statements giving reasons for purchasing a commercially produced package. Further, 20 of those principals also wrote additional information sharing their insights into the use of commercially produced packages. Of the 16
principals whose school did not use a commercially produced package, 12 principals wrote statements giving their opinions about the use of packages.

Analysing responses to the open questions required dividing the questionnaires into two groups, that is, those principals who currently used a commercially produced literacy package and those principals who did not use one, and developing a coding system to organise the data (Bogdan & Biklen, 2003). As I read the principals’ comments I identified key words and phrases and used these as coding categories (Spencer, Ritchie & O’Connor, 2003; Wiersma & Jurs, 2009), for example, “teachers lacking knowledge”; “consistency across the school”, and “excellent scaffolding for children”. After reading all questionnaires I used the key words and phrases to identify major themes, for example, the phrases, “a proven record”, “a researched resource”, were collated under the theme of reassured by research. Using charts, I recorded principals’ comments under each theme, and noted the frequency of occurrence of categories within the specific questionnaire and across all questionnaires (Cohen et al., 2007).

Analysis of data from interviews.

The process I worked through to analyse the data from the interviews was similar to that used to analyse the responses to the open questions in the questionnaire. I first divided the interview transcripts into two groups; interviews with four principals who currently used a commercially produced literacy package, and interviews with four principals who did not use one, and began the process of analysing the interview data by reading each interview transcript and identifying coding categories in the margin (Spencer et al., 2003). At this early stage I recorded words and phrases used in the interview by the principal to identify these themes, for example, “a framework for inexperienced teachers”, “up-skilling teachers”, and “aligned with National Standards”. I then collated these coding categories across all interviews, modifying some to provide clarity and used these to identify major themes (Bogdan & Biklen, 2003). To ensure no data were overlooked I reread the transcripts colour coding data according to themes, noting page references to each theme on the front page of every transcript. I then synthesised data across interviews (Spencer et al., 2003). Guided by the colour coded sections of the transcripts I transposed relevant parts of the interviews, making sure each piece was labelled with the coded name of the principal and taped these together on charts under the relevant theme. I then returned once again to the transcripts to make sure nothing pertaining to a specific theme had been overlooked.
Combining the data.

With the data from both the questionnaires and the interviews sorted and recorded on charts I then consolidated identical themes. For example, data from the questionnaires collated under the theme of Professional Development was combined with data pertaining to the same theme from the interviews ensuring the origin of the data was clear, that is, either the questionnaire or the interviews (Ritchie, Spencer & O’Connor, 2003). Not all themes occurred in both data collection tools. For example, when principals responded to the questionnaire they did not make any references to the National Standards. This contrasted with the interviews when all eight principals commented on the National Standards on a number of occasions.

With the data collated into themes I was able to identify differing viewpoints (Cresswell, 2012). For example, a principal of a school using a package described how teachers collected writing samples that were sent on to the package’s developer for analysis. That process contrasted with the process used by a principal of a school not using a package. In that school, teachers analysed their own writing samples.

Taking into account the frequency with which a topic, issue, a practice or a belief, etc., was evident in the data and how it was expressed (e.g., intensity of language, amount of description, etc.), the ensuing ten themes and their related sub themes were identified, for example, the theme professional development had related sub themes, namely, “the main attraction” (chosen from the words of one principal) and principal involvement (Ritchie, Spencer & O’Connor, 2003).

The names of the ten themes (e.g., saving time, the old order, external accountability) were derived from the language of principals and particular concerns, professional issues, beliefs and practices they raised and discussed (Bogdan & Biklen, 2003). For example, the theme, listening to the experts, was named to describe the beliefs and subsequent actions of several principals who clearly regarded specific itinerant support personnel and a package developer as experts. Likewise, the theme, the place of phonics, identified the position principals’ believed phonics should have in the literacy programme, that is, embedded or a discrete systematic approach. Teachers’ pedagogical content knowledge, a theme concerning principals’ beliefs about gaps in their teachers’ knowledge and skills, while linked by topic to the theme professional development, offered specific insights into principals’ reasons for choosing a package and was therefore regarded as a separate theme.
In summary, this chapter described the methodology of the research explaining how my epistemological stance impacted on the paradigm within which the study is set and the choice of methodology and methods. Continuing the explanation that began in Chapter One I elaborated further on my attempt to be a neutral researcher. The ethical considerations and actions undertaken to ensure participants were treated respectfully were discussed and the development of the data collection tools and analysis of the data were explained.

In the next chapter I discuss the analyses of data from the questionnaire and the interviews in relation to the two research questions.
Chapter Four: Findings and Analysis

This chapter analyses and discusses data from the questionnaires completed by all 42 Dunedin school principals and the interviews of eight principals. It is organised in two sections with Section One reporting findings to research question one: *How widespread is the use of commercially produced literacy packages in Dunedin schools?* Section Two addresses the second research question: *Why do schools choose to purchase and use a commercially produced literacy package?*

**Section One: How Widespread is the Use of Commercially Produced Literacy Packages in Dunedin Schools?**

Data from all 42 Dunedin primary schools showed that 26 of the 42 schools surveyed (i.e., 62% of schools) were using a package and 16 (38%) were not. Additional findings about package usage and the defining variables of schools, e.g., school type, state and integrated schools, decile ratings and school size, as explained in the previous chapter, were obtained from the analysis of question one data and are reported below.

**Package usage according to type of school.**

The schools surveyed included both contributing (Years 1-6) and full primary (Years 1-8). Of the 34 contributing schools, twenty (i.e., 59%) were using a package. The percentage of package usage across the eight full primary schools was higher at 75%. (See Table 5.)

<table>
<thead>
<tr>
<th></th>
<th>n</th>
<th>Using package(s)</th>
<th>Not using package(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributing</td>
<td>34</td>
<td>20 (59%)</td>
<td>14 (41%)</td>
</tr>
<tr>
<td>Full primary</td>
<td>8</td>
<td>6 (75%)</td>
<td>2 (25%)</td>
</tr>
<tr>
<td>Total</td>
<td>42</td>
<td>26 (62%)</td>
<td>16 (38%)</td>
</tr>
</tbody>
</table>

**Package usage in state and integrated school.**

Package usage in the 10 integrated schools was higher at 70% than in the 32 state schools where 59% were using a package. (See Table 6.)
Table 6:

Use of package(s): State & Integrated Schools

<table>
<thead>
<tr>
<th></th>
<th>n</th>
<th>Using packages</th>
<th>Not using packages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>n</td>
<td>%</td>
<td>n</td>
</tr>
<tr>
<td>Integrated school</td>
<td>10</td>
<td>7</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>7</td>
<td>70%</td>
<td>3</td>
</tr>
<tr>
<td>State School</td>
<td>32</td>
<td>19</td>
<td>13</td>
</tr>
<tr>
<td></td>
<td>59%</td>
<td></td>
<td>41%</td>
</tr>
<tr>
<td>Total</td>
<td>42</td>
<td>26</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>62%</td>
<td></td>
<td>38%</td>
</tr>
</tbody>
</table>

**Package usage according to socio-economic status of schools.**

Package usage across the eight schools in low socio-economic communities (i.e., schools with decile ratings 1-3) was highest at 75%. The 13 schools of medium socio-economic communities (i.e. schools with decile ratings 4-7) reported the lowest percentage of package usage at 54%. Of the 21 schools in high socio-economic communities (i.e., schools with decile ratings 8-10) the use of commercially produced packages was 62% and was less than the low socio-economic schools and greater than the medium socio-economic schools. In all three socio-economic groupings more than half of the schools were using packages. (See Table 7.)

Table 7:

Package Usage According to School Socio-economic Status

<table>
<thead>
<tr>
<th>Decile rating</th>
<th>n</th>
<th># using package(s)</th>
<th>% using package(s)</th>
<th># not using package(s)</th>
<th>% not using package(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deciles 8, 9, 10 (High Socio-economic)</td>
<td>21</td>
<td>13</td>
<td>62%</td>
<td>8</td>
<td>38%</td>
</tr>
<tr>
<td>Deciles 4, 5, 6, 7 (Medium Socio-economic)</td>
<td>13</td>
<td>7</td>
<td>54%</td>
<td>6</td>
<td>46%</td>
</tr>
<tr>
<td>Deciles 1, 2, 3 (Low Socio-economic)</td>
<td>8</td>
<td>6</td>
<td>75%</td>
<td>2</td>
<td>25%</td>
</tr>
<tr>
<td>Total</td>
<td>42</td>
<td>26</td>
<td>62%</td>
<td>16</td>
<td>38%</td>
</tr>
</tbody>
</table>
**Package usage according to school size.**

Analysis of package usage according to school size showed usage being highest across the 13 large and medium large schools at 100% and 80% respectively, lightest in the medium small sized schools (45%) and just above 50% among the small (55%) and very small schools (57%). (See Table 8.)

Table 8:

Package Usage According to School Size

<table>
<thead>
<tr>
<th>School Size</th>
<th># of schools</th>
<th># using package(s)</th>
<th>% using package(s)</th>
<th># not using package(s)</th>
<th>% not using package(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large school U5</td>
<td>3</td>
<td>3</td>
<td>100%</td>
<td>0</td>
<td>0%</td>
</tr>
<tr>
<td>(301-500 students)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium-large school U4</td>
<td>10</td>
<td>8</td>
<td>80%</td>
<td>2</td>
<td>20%</td>
</tr>
<tr>
<td>(151-300)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medium-small school U3</td>
<td>11</td>
<td>5</td>
<td>45%</td>
<td>6</td>
<td>55%</td>
</tr>
<tr>
<td>(101-150)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small school U2</td>
<td>11</td>
<td>6</td>
<td>55%</td>
<td>5</td>
<td>45%</td>
</tr>
<tr>
<td>(51-100)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very small school U1</td>
<td>7</td>
<td>4</td>
<td>57%</td>
<td>3</td>
<td>43%</td>
</tr>
<tr>
<td>(1-50)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>42</td>
<td>26</td>
<td>62%</td>
<td>16</td>
<td>38%</td>
</tr>
</tbody>
</table>

**The most frequently used packages.**

The English produced package for teaching letters and sounds, *Jolly Phonics*, was the most frequently used literacy teaching package. It was used in 73% of the 26 Dunedin primary schools with packages (i.e., in 19 schools). The next most frequently used packages were the Otago produced *Sounds Alive*, for teaching letters, sounds and spelling and *Words Alive*, a writing package. *Sounds Alive* was used in eight schools, seven of which also used *Words
Alive. Three packages, *Lexia*, *Smart Phonics* and *Smart Kiddies*; *Spelling under Scrutiny*; and *Switch into Spelling*, were each used in four schools.

Other packages used in Dunedin schools were: *Letterland*, used for teaching letter sounds and letter formation as described in Chapter One; *P M Writing Programme*; *Probe: Key into Theory*; *Probe: Key into Reorganisation*; *Steps to Literacy*; and *Spelling Made Easy*. Each of these packages was used in no more than two schools (Refer to Appendix F for a complete list of packages).

**Schools that had ceased using a package.**

Three of the 42 Dunedin schools, having used a package in the previous four years, had discontinued package usage the year before the study’s phase one data collection. All three schools were contributing and small (two were U2; one was U1). One school was in a high socio-economic community (decile rating 8-10) while the other two were in medium socio-economic communities (i.e., decile ratings 4-7).

The reasons one principal gave for discontinuing the usage of two packages were that they were “extremely expensive” and that “the results did not show any dramatic increase in improvement” (principal NP12). The principal of the second discontinuing school also proffered two reasons detailing that the package was “too expensive” and that the package provider was no longer available to provide professional development and support (principal NP13). The principal of the third discontinuing school provided no explanation.

**Summary.**

The predominate finding from the question one data is that the use of commercially produced teaching packages in the population of Dunedin primary schools is widespread, with three out of every five schools, or 62% of all schools, using one or more packages. Package usage is highest (75%) among full primary schools, integrated schools (70%), low socio-economic schools (75%) and large and medium large schools (100% and 80%). Package usage is lightest in the following types of schools, contributing (50%), state (59%), medium socio-economic (54%) and medium small schools (45%).
Section Two: Why Do Dunedin Schools Choose to Purchase and Use a Commercially Produced Literacy Package?

Ten themes, derived from analysis of the questionnaire and interview data, provide insights as to why 62% of Dunedin primary school principals chose to purchase and use a commercially produced literacy package. These themes, namely, the place of phonics; professional development; saving time; listening to the experts; the old order; school-wide consistency; teachers’ pedagogical content knowledge; external accountability; reassured by research; and using assessment data, are interpreted and discussed, making links with the literature about the continuing debate about the teaching of reading, the intensification of teachers’ work, the professional development of teachers, and the New Zealand neo-liberal school reforms.

The place of phonics.
The place of phonics theme in the teaching of reading, one of education’s long running issues, was evident in both the questionnaires and in the rich text data from the interviews with the eight principals. Many principals purchased a commercially produced package, as Principal SP5 explained, “to help with letter sounds and letter recognition”. Further, as noted above, the two most frequently used commercially produced packages in Dunedin primary schools, Jolly Phonics, and Sounds Alive, were designed to teach students about letters and their associated sounds.

Systematic phonics teaching.
Jolly Phonics and Sounds Alive are both systematic phonics teaching packages in that the teaching of letters and sounds follows a planned sequence of teaching phonics elements rather than emphasizing an element when it appears in text (National Reading Panel, 2000). In other words, the order in which phonics elements are taught is prearranged and the teaching of each sound and its associated letter is explicit. That prescribed teaching sequence was what schools wanted. As principal SP23 explained when discussing Sounds Alive, “The framework is set and it’s very descriptive”. The fixed and specified nature of Sounds Alive also clearly appealed to principal SP20 who praised the package saying, “It’s very prescriptive”.

Principals also commented positively on the prescriptive framework that was a feature of Jolly Phonics, a package that was in more than twice as many schools as Sounds Alive, the second most commonly used package. Principal SP22 described Jolly Phonics as a “great teaching tool” and principal SP2 explained that the school purchased Jolly Phonics because it was a “structured programme with set lessons and resources”. Clearly, principals wanted a
package that provided both the order for teaching phonics elements and the pedagogy and those packages met their expectations.

**Knowing how to teach phonics.**

Both the Jolly Phonics and Sounds Alive packages, with their highly prescriptive pedagogies, instruct teachers how to teach phonics. For example, Jolly Phonics stipulates that each lesson comprises four parts involving sound, action, and visual information (Lloyd, 2005). Likewise, Sounds Alive also specifies the pedagogy which is, in the words of principal SP20, “very prescriptive – like the kids use their hands to show separating and blending and putting words back together”.

Given New Zealand’s long adherence to a whole language approach to the teaching of literacy, New Zealand-born teachers are unlikely, in the course of their own schooling, to have been taught phonics knowledge in a sequential, prearranged way and, further, may not have learned about phonics and the explicit teaching of phonics as part of their pre-service training. According to O’Hare (cited in Nicholson, 1998), students studying to become teachers are not given instruction in how to teach phonics. Principal SP25’s decision to use *Jolly Phonics* supports O’Hare’s claim stating it was “purchased to support the…beginning teacher”.

The question arises, might it be that such factors as teachers’ lack of pedagogical content knowledge of phonics, and teachers’ confidence levels about their proficiency to teach phonics, are in some measurable way driving schools’ decisions to use a commercially produced literacy teaching package? That would appear to be the reason principal SP6’s school used *Jolly Phonics*:

Teachers often recognise what skills and knowledge students are lacking but they don’t always know how to address these. A ‘package’ such as *Jolly Phonics* provides a structure and the materials that enable the teacher to systematically teach and plug the gaps.

By stating that teachers do not always know how to address students’ lack of knowledge and skills, principal SP6 is asserting that teachers, not having content knowledge of phonics or
knowledge of how to teach it, can remedy that gap in their pedagogical content knowledge with the use of a systematic phonics teaching package such as Jolly Phonics.

Additionally, Jolly Phonics was sometimes used for teachers who had been assigned to a new level in the school, for example, changing from teaching senior students to working with children in their first or second year of school. Because the package provides teachers with details about what to teach, when to teach, and how to present lessons, it was used to give teachers, unfamiliar with literacy teaching at their new class teaching level, pedagogical content knowledge of phonics. For example, principal SP24 used the package “as a basis for teaching letters/sounds [for a] teacher just starting a new year level”. Thus, by providing such teachers with Jolly Phonics they were able to access pedagogical content knowledge and therefore comply with their school’s directive to implement a systematic phonics programme.

**A whole language approach.**

In contrast, it was obvious that principals of schools without a package did not believe in implementing a systematic phonics teaching programme. Rather, they articulated their belief in a whole language or balanced approach to the teaching of literacy. For example, principal NP10 stated, “We believe in a whole language approach to teaching literacy”. They commented on their use of handbooks supplied by the Ministry of Education, namely, *Effective Literacy in Years 1-4* and *Effective Literacy in Years 5-8* to support their literacy programmes. Principal NP9 explaining his stance, wrote: “I believe NZ schools are very well resourced by the Ministry of Education through their contracted printer and publications in providing a wide range of reading materials to support literacy programmes”. Principal NP3 expressed a similar position stating: “We prefer to use and apply the teaching practices and ideas in publications like Effective Literacy Practice Yr1-4 and Yr5-8 in regard to literacy teaching”. In making these statements principals NP3 and NP9 signified their congruence with both the whole language philosophy and the practices espoused in Ministry of Education handbooks.

In summary, the data relating to this first theme, the place of phonics, supports three findings. The first is that the main reason principals decided to purchase a commercially produced literacy package was to teach phonics. The second finding is that they wanted a package detailing the order for teaching phonics elements (i.e., a systematic approach), and, the last is that the two groups of principals (those in a school with a package and those in a school
without one) held very diverse beliefs about the efficacy of different approaches to the teaching of reading and writing.

A related finding is that phonics packages, with a fixed prescribed order for the teaching of letters and sounds, generate precise data about each student’s learning of discrete units of letter-sound knowledge. Principal SP19 recognised this attribute when she explained that *Sounds Alive* makes “excellent use of data gathering to measure children’s individual learning and progress”. Accepting the stringent neo-liberal “audit culture” (Apple, 2007, p.112) within which schools operate, this package-generated data about student learning provides principals with evidence of both student and school learning outcomes.

**Professional development.**

*“The main attraction…”*.

Almost half of all principals of schools with commercially produced packages (i.e., 12 principals) purchased a package for its professional development component. Some of those packages delivered face-to-face, in-school professional development and support (e.g., *Sounds Alive* and *Words Alive*), giving principals a package for teaching students about letters and sounds and writing, and also a readymade professional development programme for their teachers. Principal SP3 voiced the school’s satisfaction with the *Words Alive* professional development component saying, “We were impressed with the whole school PD and intensive in-school support. No other programme offered this”. Similar approval was noted by principal SP5: “The professional development workshops and staff discussions held when implementing these packages have been influential in how we teach”. Principals using packages with a professional development component were thus spared the time required for planning, organising and delivering professional development. This provision of professional development was, as principal SP4 explained, “the main attraction. If we hadn’t had the professional development component of that programme which you actually need, because reading a manual…it will just go over the top. That is why we chose it”.

**Principal involvement.**

According to the interview data, both groups of principals, that is, principals of schools using a package and those not using one, considered their involvement in the school’s professional

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1 Principal SP4
development to be an important aspect of their job. Principals of schools with a package described their involvement in the school’s professional development as extending beyond the planning stage to being actively involved throughout. Principal SP20 explained that several schools came together for professional development relating to their package, saying, “We all come together as a cluster, that is, all the principals and all the teachers. Principal involvement in this is really strong”. Principal SP23 made a similar comment emphasising the active participation of principals: “…and the principals were there. They were paramount to this development”.

Principals of schools without packages were also involved in their school’s professional development, but their roles differed from that of principals of schools with packages. Instead of participating in the professional development component of a commercially produced literacy package, they led the staff development and, along with their teachers, identified experts within or outside the school to provide input. Their role encompassed planning, resourcing, and managing their school’s professional development programme.

Principal NP2 described her role in the school’s professional development:

> I provide some of it. But it is planned and focused ourselves and we have a targeted area. We target that area through our collection of data. We pull in experts or advisors from the College [of Education], or we run it ourselves. It’s a whole-school commitment to the PD and we clarify our expectations.

The first of these findings, that almost half of the 26 principals of schools using a literacy package, made the decision to purchase their package because of the professional development component, underscores the workload issues involved with the planning and delivery of school-based professional development. The job intensification factor associated with package usage is discussed in the next theme.

The second finding, that both groups of principals, those with packages and those without packages, were actively involved in their school’s professional development, is consistent with what the literature deems as best practice. The Education Review Office (2009), reporting on professional development in New Zealand schools, found that the principal’s leadership and management was a pivotal factor and largely accounted for the difference in the efficacy of teachers’ professional learning programmes.
Saving time.
The saving time theme was evident in both questionnaire and interview data. Principals, in valuing the essential defining features of commercially produced packages, namely, prepared, prescriptive, structured, sequential lessons; a teacher’s manual and durable, colourful, attractive, readymade resources for teaching and learning, perceived them as providing likely solutions to teachers’ workload pressures accentuated by the accountability and compliance requirements in a neo-liberal environment. For example, principal SP9 commented on the “clear sequential learning” and “the manual which we use it’s very clear”, and principal SP2 focused on the “bright, colourful, sturdy, supporting resources”. For principals and teachers, struggling with increased administrative tasks, “paper trails of monitoring” (Hargreaves, 2000, p. 168), pressure to learn new curricula developments, and to plan programmes that provided for the needs of a diverse range of students (Easthope & Easthope, 2000; Williamson & Myhill, 2008), a package was viewed as being a time-saving bonus. A readymade package would help teachers cope with intensification, defined by Galton and MacBeath (2002) as the, “increasing pressure to do more in less time” (p. 13). Because it was complete within itself teachers would not need to spend time researching best practice, developing lessons, deciding what to teach or how to teach, or making resources. In the words of principal SP23, “packages often have a specific structure that assists busy teachers”.

Principal NP9 elaborated further on the use of commercially produced teaching packages as a means of coping with the intensification of teachers’ workloads stating:

It’s like a quick fix, isn’t it? I mean there is going to be a market for all those sorts of things, because we are all so busy and are expected to do so much more in terms of delivering the curriculum, but also meeting the emotional and social well-being of children, that a package can sometimes appeal to being a survivor to some of the additions we have to do. The quick fix!

Principal NP9, while leading a school not using a package but having previously worked across a number of schools, expressed empathy with her principal colleagues as they tried to balance teaching the curriculum and caring for their students. She and her colleagues, working in a culture of performativity in which they were being judged by what they produced (Codd, 2005), clearly felt under pressure to produce satisfactory evidence of student learning. She envisioned a time when more principals, in an attempt to be a “survivor” of workload pressures, would use a package as a “quick fix” (i.e., a solution to intensification).
Principal NP9’s predictions echoed Hargreaves’ (1992) and Apple’s (1986) observations. They noted that the on-going effects of intensification could lead to teachers’ becoming dependent on what Hargreaves called pre-packaged curricula or, as it is called in this study, the commercially produced teaching package.

**Listening to the experts.**

Several Dunedin principals, perceiving package developers and itinerant resource teachers to be experts in facilitating teachers’ professional development and literacy learning respectively, listened to the experts’ suggestions and considered purchasing a commercially produced literacy teaching package.

**The package developer as expert.**

The strength and conviction with which principals spoke of their regard for the developer of *Sounds Alive* and *Words Alive* revealed that, without question, they viewed her as an expert. In their eyes she had credibility because she “has been in our system. She knows our curriculum” (Principal SP4) and, as a primary school teacher, had developed her packages as a result of adapting and trialling aspects of her own reading and writing programmes. Principals spoke convincingly about the developer’s professional background, her knowledge of language, and her ability to communicate with parents and to motivate teachers. Principal SP20’s opinions echoed the comments of others when describing the developer as “vibrant, motivating and intelligent”, and “She ‘blows parents away’ with her knowledge. She really knows how to present”. Principal SP4, having replaced *Jolly Phonics* with *Sounds Alive* and *Words Alive*, affirmed her decision stating: “You actually have to go to the experts who know what they are talking about”, and attesting to the developer’s knowledge of language and writing, she added, “You need to have someone who knows their stuff. And if you don’t, the credibility goes out the window and your cause is lost”. Principal SP23 voiced similar regard for the package developer saying:

> The person who wrote the programme, who put the programme together was a very creditable person, you know. She created the package because of a need she saw in her own school and her own teaching. Yes, I think that’s very important. It wasn’t a package that came from a big commercially produced publisher. No, it was a package from a classroom teacher who had noticed discrepancies within her reading and writing programme in her own classroom and decided this was a way to help.
In this case, the packages’ developer, because of her knowledge of the New Zealand curriculum, her experience as a primary school teacher, her initiative in designing programmes, and her ability as a dynamic presenter, was clearly perceived as an expert by some Dunedin principals.

**Itinerant resource teachers as experts.**

The status of expert was not restricted to package developers. Several principals perceived itinerant resource teachers as having expertise in the teaching of literacy. The recommendations of a Resource Teacher of Learning and Behaviour (RTLB) and a speech-language therapist influenced some Dunedin principals to purchase a package. Principal SP6, who had worked with an RTLB for a number of years, explained why the RTLB liked *Jolly Phonics* and recommended it to schools:

She was just a really strong advocate of *Jolly Phonics* because obviously the children she was working with – their needs were not being met by traditional approaches being used. She liked the fact that there was something visual for them to see. There was a wee story that ‘took’ in their minds. There was a pictorial with a movement, there was an auditory learning part as well. So she was hooked because it involved multiple sensory modes and it was probably more likely to have an impact on a wider variety of students.

This resource teacher’s recommendation was a critical factor in one principal’s decision to purchase the *Jolly Phonics* package. The same principal, SP6, also discussed “the whole theory of written English, and the link between oral language and the development of reading and writing skills” with a speech-language therapist before purchasing a package. “I listened to her first to get a really good grasp of what we are really looking at, and looking for and then probably we looked at a couple of different readily available commercial packages”.

Principals who conferred the status of expert on local school support personnel who came into their school to advise on and assist with curriculum delivery, accepted and acted on their recommendations about package use. Conversely, principals in schools without a package made no mention of any school support personnel recommending the use of packages in their schools.

This finding, namely, that some principals sought and listened to the “reassuring counsel” of outside experts about package use, is what Apple (1986, 1993) observed in North American
schools when studying intensification. He noted that intensification could cause teachers to lose confidence in themselves and to develop a reliance on experts.

**Losing the expert.**

The prospect of the *Sounds Alive, Words Alive* package developer being unavailable the year after the interviews were conducted affected two principals in very different ways. Principal SP20 was concerned “whether this programme will stand” and that as a consequence of the developer going overseas, “we will lose her PD [professional development] as such”. Principal SP23, on the other hand, expressed confidence in the school to “keep it going now” and attributed this to the package and that “the model itself was complete”, itemising “elements of consistency, professional development of assessment and data”.

Further, as noted earlier, of the three Dunedin schools that previously used a package and then ceased package usage, one school discontinued because the package provider “had to pull out as she was not available to run the contract” (Principal NP13).

Although this particular finding is not central to the theme, listening to the expert, it nonetheless provides a further insight into the influence, both intended and unintended, that external experts sometimes have when they are accorded recognition and prestige by the people they are working with. Illustrating this additional insight about the impact of external experts is the following comment from Timperley et al. (2007) concerning situations:

…where outside experts develop recipes for teaching (typically based on research about what works for students) then present prescribed practices to teachers with an underpinning rationale and monitor their implementation carefully to ensure integrity. The overall evidence is that these processes can be effective in changing teaching practices, but either the changes have limited impact on student outcomes or they are not sustained once the providers withdraw. (p. xxvi)

**The “old order”**.

Most principals, when discussing curriculum delivery and related teacher support made references in their interviews to the delivery of professional development at no cost in earlier times by the then Department of Education via national, regional, and local inservice courses. For example, principal SP23 recalled “ERIC and LARIC – they were literacy PD and they were free”. (ERIC, an acronym for Early Reading Inservice Course, was provided free for
teachers in the 1970s; LARIC, Later Reading Inservice Course, also free, was a multimedia course available in the 1980s.) Principal SP23, emphasising that professional development used to be free, asserted: “We would not have had to pay anything, as it would have been funded by the Ministry of Education and the Advisory Service advisors would have provided it”. In contrast, Principal SP20 spoke about the current situation and the cost of the school’s two packages, used because they “upskill teachers. It’s expensive – and therefore it’s inequitable. It has cost us about $20,000 over three years”.

Principals without packages spoke about being able to use school advisors for support with curriculum delivery and professional development. The concern for some was whether money would be available to continue with Ministry of Education Professional Development contracts. Principal NP3 explained, “We will continue…as long as the money comes through of course – you never know about that”.

In discussing the Old Order and comparing the provision and delivery of professional development pre-Tomorrow’s Schools with that of the present day, the principals were making a number of points, namely, that professional development used to be provided free of charge to schools; that now principals are uncertain about money being available for Ministry of Education professional development contracts, and that package professional development, used to increase teachers’ skills and lift student achievement, is expensive. What principals did not discuss was that under the old order, both the curriculum and pedagogical content of professional development was decided by the Department of Education and its curriculum advisors. Nor did they make the point that principals now have sole responsibility for choosing the curriculum content of professional development and can decide how they will deliver the curriculum. That choice, a hallmark of neo-liberalism, delivered to principals via the Tomorrow’s Schools reform, empowers them to decide, for example, whether they will purchase and use a commercially produced literacy package. It also enables them to decide whether they, for example, implement an embedded or a systematic approach to their teaching of phonics. Principal NP2 encapsulates this notion of choice as it applies to the timing, content and delivery of professional development, saying, “We are able…to shift and change practice or approved programming. In other words we can rethink what we are doing to ensure that the achievement is on track or above track”.
School-wide consistency.

Principals of schools with packages wanted consistency in teaching methods, understandings and knowledge across the school and they believed that could be developed through school-wide professional development focusing on the use of their package. In providing a reason for purchasing a package, principal SP3 explained “We were looking for something that would unify teaching practice in the area of literacy-writing programmes”. Other principals expressed similar intentions, seeking to develop consistency “across the team” (Principal SP22), “throughout the Yr1-6 classes” (Principal SP19), and “across school” (Principal SP17). Principal SP20 elaborated, “It’s everybody talking together, and coming to a common understanding about what we think is important about writing”. For several principals the professional development programme was the vehicle for teachers to come together, share ideas and, through guided discussion, develop school wide goals, and collective understandings. Principal SP23 expounded the advantages of the school-wide approach to professional development:

The package gives us parameters that one works within. It gives us the benchmarks, the expectations. It means that teachers have been exposed to the same professional development; so all teachers are on the same page as far as the vocabulary they are using to talk about the writing.

In this case, in principal SP23’s school and in other schools using packages, it was the externally produced literacy teaching package that gave the school the benchmarks, the expectations, a common language, the professional development and the sought-after, ensuing school-wide consistency.

While principals of schools not using a package also wanted consistency in understandings and practices across the school, they achieved that goal in various ways. Illustrating this is Principal NP8’s notion of school-wide professional development. It differed greatly from that of principals of schools with packages. Although the professional development was school-wide, the focus was on attending to individual teacher needs:

School-wide does not mean that we all absolutely do the same thing. We certainly do many of the same things, but within that there is capacity for individual teachers to say ‘this is an area where I personally need to develop within the whole-school focus’… What is vital is that we respond to individual needs.
Some principals considered using a package as a professional development tool to be limiting in that copyright matters placed constraints on how it was used. As principal NP8 explained, rather than using a package that “locked us in” to a specific pedagogy, the school preferred to use a range of resources and approaches that suited individual students and teachers. She assumed that teachers were capable of a flexible approach which allowed them to identify their own areas for professional development.

On the other hand, Principal NP2, considering “a clear purpose in teaching literacy…shared expectations…proven assessment data collection and understandings of that” to be very important, set about achieving consistency through focused staff reviews and discussions:

Certainly in my school there is an expectation that we would be cross-moderating together. We will be having conversations – even if it’s not full moderation of a sample of written language or reading. There would be an expectation that we would be discussing either the reading record or the writing sample… We work very hard to achieve consistency of practice and programming within the school. That’s crucial and it is critical we have evidence to support it.

That divergence in principals’ thinking about professional development was also evident in the next finding, teachers’ pedagogical content knowledge.

**Teachers’ pedagogical content knowledge.**

*“Teachers didn’t have enough knowledge...”*

Some principals using a package, having previously identified significant gaps in teachers’ knowledge pertaining to grammar (e.g., not being able to name parts of speech or to identify different kinds of sentences), how to teach writing, making meaning of text, spelling rules, and phonics, considered purchasing and using a package as a means of addressing those gaps. Pedagogical content knowledge is defined by Timperley et al. (2007) as “the combination of knowledge that teachers need to have about curriculum content, how to teach it, and how to understand students’ thinking about that branch of knowledge” (p. 283). In short, to be effective, teachers have to understand the content of their lesson and know how to present it (Darling-Hammond, 1997; Guskey & Yoon, 2009).

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2 Principal SP4
Principal SP6, echoing those same points, noted the adverse effect those gaps in teachers’ pedagogical content knowledge had on student learning:

You find that, especially depending on the age of the group of teachers, they don’t actually – or have not had necessarily, a strong education themselves as primary school or high school students in some of this…phonemic awareness, or even spelling, all that sort of thing. For their own…lack of knowledge hinders what they can do for children.

Several principals, seeking explanations for teachers’ insufficient knowledge about grammar, attributed this to their primary or secondary education or their pre-service teacher education. As principal SP6 stated, in discussing teachers’ lack of knowledge about words and sounds, suffixes, and prefixes, “Maybe it was not covered in great depth at College”. Principal SP20 articulated similar observations stating, “I think there has been a whole generation that didn’t know about adverbs and conjunctions”.

*Teaching writing.*

Principal SP4, when discussing the school’s “literacy journey”, explained that the teachers “didn’t know where the next learning steps for the children were” and summarised the school’s predicament saying “Teachers didn’t have enough knowledge to teach writing effectively”. The solution for principal SP4 was the professional development that came with the *Words Alive* package that looked “more specifically at the crafting of the writing, the grammar, the spelling…and whether sentences are simple, complex, compound, and whether they are using subordinate clauses all those sorts of things…. It’s just such good professional development for all of us”. Likewise, principal SP20, in discussing gaps in teachers’ knowledge stated, “I do think there is a gap…where grammar is not understood by teachers”. She also valued the *Words Alive* professional development explaining “I believed it would help, school-wide, with our writing achievement but especially because it was about building teacher capability”. Further, principals attributed teachers’ increased confidence in teaching writing to the package professional development. Principal SP9 explained, “The professional development workshops and staff discussions held when implementing these packages has been influential in how we teach”. For principals using *Words Alive*, this writing package was viewed as a method of addressing teachers’ insufficient knowledge about the writing process and how to teach writing. Principal SP23’s comment summed this up: “It’s a really good package that actually fills the gaps for us in our knowledge of how to teach writing”.
Teaching comprehension.

Another area in which principals identified gaps in teachers’ pedagogical content knowledge was teaching children to make meaning from text. Principal SP6 found the package Probe, Key into Theory to be:

A godsend because it breaks down and gives small chunks of learning that teachers can give to students who are struggling, to actually teach them the mechanics of how to pull apart a bit of text to actually get to the comprehension…. We probably take it for granted that all kids get what we mean when we say ‘find the information’. But, sometimes teachers need a little bit of help to do that.

Principal SP6, observing the need for teachers to have support in teaching students how to gain meaning from text, also noted that the package was able to provide teachers with pedagogical content knowledge.

Thus, these principals, having identified and then addressed what they considered to be significant gaps in teachers’ pedagogical content knowledge, attributed the successful professional learning outcome to their decision to purchase and use a commercially produced package. In discussing what teachers had learned, principals were adamant that package usage had directly contributed to increased pedagogical and curriculum content knowledge in phonics, writing, grammar, spelling and reading comprehension.

“We are blessed at this school…”3

In contrast, principals in schools without a package did not make any reference to gaps in teachers’ knowledge. Instead, they emphasised teachers’ experience, teaching skills and knowledge. Principal NP11 stated, “We are blessed at this school to have a talented, experienced and knowledgeable group who are passionate about literacy”. A similar statement was made by principal NP3, “We have very experienced teachers who are skilled in the teaching of literacy”. And principal NP10 detailed the extra knowledge and skills teachers had: “All of our junior school teachers have been Reading Recovery teachers at some stage and this reflects the teaching we do in literacy. Effective literacy happens when teachers have a wide range of skills to draw on”. Principal NP11 summarised the skills and knowledge teachers must have to create their own literacy programmes:

3 Principal NP11
There is a vast difference in creating your own literacy programme from a school-designed curriculum than taking on a programme package approach. To develop your own literacy programme requires robust professional development alongside advisers/experts, reviewing existing programmes, affirming beliefs in pedagogy and delivery and defining assessment practices. Teachers know it, they understand it, and can articulate the way the programme works.

Principal NP11 was confident that teachers could not only develop classroom programmes from the school’s curriculum plan but could also explain what they were doing. In other words, her teachers had the pedagogical content knowledge to plan, teach, and articulate their own literacy programmes.

Of the multiple findings relating to teachers’ pedagogical content knowledge and package usage discussed above, the major finding is that principals of schools with packages, having identified gaps in their teachers’ pedagogical content knowledge, considered commercially produced packages were the solution for remedying that lack of knowledge.

**External accountability.**

Principals of some Dunedin schools with packages, attributed a sense of security and confidence to package usage explaining that it equipped them, in part, to satisfy external accountability demands. In discussing these demands, principals were variously referring to the Education Review Office, the school’s annual reporting of student achievement targets and any variance, and predominately, because of the timing of the phase two data collection of this study, the newly introduced national standards.

**National standards.**

The mandating of New Zealand National Standards in 2010, a government initiative to reduce what the Minister of Education claimed was the academic failure of one in five children, required teachers to assess students’ achievements in reading, writing, and mathematics, and to report to parents in plain English how their child is performing in relation to other children the same age (Tolley, 2009). Although National Standards came into effect at the beginning of 2010, when principals completed this study’s questionnaire in August of that year not one principal made reference to them. But, three months later, when the interviews took place, all eight principals commented on them. Obviously, this new school audit procedure, a feature of
a neo-liberal approach to education, gave rise to further pressures and anxieties as principals struggled to ascertain what was expected of them.

Principals of schools using the *Words Alive* literacy teaching package spoke about a recent modification to the package, the addition of new rubrics, that the package developer produced to demonstrate how it aligned with the National Standards. Principal, SP20, articulated a newfound sense of security saying:

> Recently she [the package developer] aligned them with National Standards and AsTTLe [Assessment Tools for Teaching and Learning]. That’s given us something we can now use. Teachers like having that knowledge, knowing where they are going and what’s next. It gives them security and I don’t think we’ve ever had that before in writing.

The principal and teachers felt confident that they could now explain how, by using the *Words Alive* package, the school was meeting the National Standards.

Likewise, principals of schools not using a package, also spoke about their efforts to become informed about the compulsory National Standards. One school had focused on *The New Zealand Curriculum* for staff development during the year and had begun examining the National Standards. Principal NP11 explained that “The key focus, well, obviously this year it’s the curriculum. It’s assessment with the Standards, and that itself had led to a lot of robust professional development around literacy”. And principal NP3 described how staff members “nut things out together” and that “there has been lots of discussions around National Standards, trying to work out what they actually mean – the writing standard particularly”.

In summary, the significance of this finding is that in some schools using packages, teachers considered they were well equipped to meet the demands placed on them by the new national standards because of their use of a particular teaching package. On the other hand, in schools without packages, teachers and principals were, as best they could, struggling to ascertain what was required of them.

**Meeting literacy targets.**

Some principals purchased a package believing that package usage would ensure the school met what principals referred to as literacy targets. Targets for improved student achievement are required by regulation to be included in a school’s annual report along with “an analysis of any variance” between the targets and what their students actually achieve during the year.
All schools, operating in a culture of managerialism, now engage in an annual process of setting and reviewing targets as part of their strategic planning and reporting cycle.

Principals who purchased a package determined that they needed to target student achievement in either reading, writing and/or spelling. They had “identified a real need to enhance children’s achievement levels” (Principal SP4) and looked to package use as a means of lifting student literacy learning. Principal SP23 explained how:

The children were writing at a level way lower than the level they were reading at, and so the first contact we had was that the school we visited had used the model [i.e., package] we were going to use and they could show they had lifted the level of their children’s writing to the same level as their reading. And we felt that was what we desperately needed to do. That was why we initially investigated the package.

The purchase and use of a package by a neighbouring school and the school’s sharing of package generated data (i.e., a lift in student achievement) influenced principal SP23’s decision to purchase a package. Similarly, principal SP8 described how concerns about student achievement similarly drove his decision to purchase a package:

As a result of a curriculum report focussed on spelling, it was necessary to review current practice, identify pros/cons of the variety of spelling programmes operating within the school. We examined programmes currently used within the school, programmes available and contacted a variety of schools to discuss their programmes. As a result of the process we decided to implement Sounds Alive and trial this programme. After 3 years of Sounds Alive we decided to implement the Words Alive programme.

Thus, this finding, that some principals expected that commercially prepared packages with their prescribed pedagogy, “a structured programme…with set lessons and resources” (Principal SP2) and “logical learning progressions” (Principal SP9) could be effective in meeting student achievement targets, raises the question, what happens in schools not using packages?

Principals in schools not using a package also spoke about setting targets and their processes to achieve these. Like the principals with packages they used a variety of assessment tools to collect data about students’ achievements, e.g., running records of students’ oral reading,
National Education Monitoring Project assessment tasks, standardised tests, school benchmarks, and commercial tests such as PROBE. But, unlike their colleagues, they did not purchase a commercially produced package to meet literacy targets. Instead they worked with teachers to develop action plans and monitor students’ progress. Principal NP2 explained how their processes for meeting targets and teacher appraisal were integrated: “We align our targets to our appraisal process. Each teacher sets up their own inquiry into practice with goals”. In another school not using a package the focus of the literacy target became a topic for professional development. Principal NP11 stated that “There is regular monitoring of where everyone is at and the PD sits alongside that. If we focus on a writing target then we’ve got staff meetings focusing on that”.

Reassured by research.

Several principals using a commercially produced literacy package were reassured by references to research in the package’s marketing information. For example, some schools that had purchased Jolly Phonics noted, that according to research claims in the package material, their package would ensure students learned about letters and associated sounds. Principal SP2’s explained that the school was using Jolly Phonics because of “a proven record …acquisition of sounds and application to writing/reading”. Similarly, principal SP10 when discussing the school’s purchase of Jolly Phonics stated that the package was a “researched resource with recognised outcomes to support literacy learning”. And, principal SP6, in discussing her opinions about the benefits of using a commercially produced package made reference to research underpinning package development saying “it gives you a lovely strong baseline that is founded on research”. Further, when principal SP6 described a newly purchased package, Reading Together, she again made reference to research declaring “I’m happy to learn more about it and will use it if proper research has shown it will work”.

This finding, that some principals took note of research claims in package advertising material, while not presented as a compelling reason for purchasing a package, nonetheless showed that these research-based claims were sometimes accepted as evidence of the package’s potential effectiveness.
Using assessment data.

Using assessment data to identify the next teaching steps was a theme apparent in the interviews with both groups of principals, (i.e., those using packages and those in schools that did not use a package). Principal SP17’s comment illustrated how analysis of assessment data was used to pinpoint areas of need: “Identification of a need in our curriculum. Underachieving in reading/writing”.

Principals using packages such as *Lexia*, *Sounds Alive*, and *Words Alive* that had an assessment component found it useful in identifying the next teaching steps. Principal SP6 described how the RTLB used the computer-based package, *Lexia*, with students: “Assess them using *Lexia*, provide a trial using *Lexia* for them” and then the students were able to use that package independently. Principal SP20 explained how the *Words Alive* package’s rubrics and its procedures for ascertaining the next learning steps helped teachers saying:

> It talks about assessment, and that’s really important. We’ve got school-wide rubrics where the students develop, progress through the rubrics at each stage and where the assessment is geared into the next learning steps which to me is really important. It takes children from where they are, to where they need to go. Assessment is really all about children’s learning. In saying that, because it is consistent across the school we can pull in the data and we know it is rigorous and valid because it builds on what had previously been taught.

However, while schools had similar purposes for analysing and using assessment data, the process differed between some schools with packages and some without. For example, principal SP4 described the school’s data collection stating, “They [teachers] collected a sample of writing…and it was sent away to her [the package developer] and she analysed the data, and then we got a report”.

Data collection and analysis was also undertaken by schools not using a package, the difference being that in those schools teachers, unlike the teachers in principal SP4’s school, analysed their own samples of writing. Principal NP2, in a school not using a package, explained that teachers were involved in each step of the process:

> We had a focus with five schools on writing achievement across the school. Improving teachers in their analysis of writing and then making informed decisions about the next steps and teaching programmes is what it is about. We did this without any packages or
advisory support. We had set tasks that were undertaken in every school for every classroom. We then analysed and assessed the data in our own schools individually and then as a cluster….We next met as a cluster and cross moderated within syndicates…. From there we drew up generic next steps. That’s all about developing the all-important consistency and of course the shared understandings.

Teachers in these schools were learning how to analyse assessment data and, through a process of moderation, ensured there was consistency in the analysis. They were not dependent on an outside expert or package prescriptions to do the analysis for them.

**Summary.**

In summary, this chapter interpreted and discussed the data pertaining to the two research questions, that is, the number of schools using a literacy teaching package, and why principals chose to purchase and use a package. The questionnaire data showed that in 2010 three out of every five Dunedin primary schools used a commercially produced package for part of their literacy programme.

A prime reason for many principals purchasing a package was to teach students about letters and their sounds suggesting that principals had been influenced by the long running public New Zealand debate about the teaching of phonics. Some principals also chose to purchase and use a package as a solution to the intensification of teachers’ work.

Packages, with their readymade teaching plans and resources, detailed, prescriptive pedagogy, and a scope and sequence of lessons saved teacher time and remedied gaps in teachers’ pedagogical content knowledge. Further, the addition of detailed teacher handbooks and, in the case of two frequently used packages, a professional development package component that gave support from the programme developer, were also viewed as reasons for purchasing a package. In short, principals believed that use of a package ensured consistency in knowledge, understandings, and skills throughout the school as teachers learned new ways of teaching. Moreover, they experienced a sense of security knowing that their package could be used as evidence that their teachers were meeting external accountability demands.

In chapter five, the study’s findings about package usage are summarised. Comparisons are made between the perspectives of principals using a package and those not using a package.
Additionally, two recommendations are made for further research about the use of commercially produced literacy packages by New Zealand schools.
Chapter Five: Conclusion

This chapter is organised in three sections. The first is a summary of the findings. The second compares the beliefs and practices of principals who purchased a commercially produced package with those of principals in schools without packages, and the third has recommendations for further research.

Section One: Summary of Findings

The major finding to research question one is that the use of commercially produced packages in Dunedin primary schools is widespread with 62% of schools using one or more packages for the teaching of literacy. In contrast, the answers to question two, which sought to discover reasons for package usage, are more complex, varied, and greater in number. Five key findings are summarised below.

The place of phonics in the reading programme.

The main reason for purchasing a commercially produced literacy package was to teach phonics. The number of schools using at least one phonics package (i.e., 25 schools out of the 26 schools using packages) attests to their popularity. Many schools with packages have been influenced by critics of the whole language approach and their recommendations for an explicit emphasis on decoding. These schools exercised their right to choose to teach systematic phonics – a prerogative emanating from the Tomorrow’s Schools reforms.

The professional development of teachers.

Almost half of all 26 principals of schools with a package decided to purchase particular packages (i.e., Sounds Alive, Words Alive) because they included a face-to-face, school-wide professional development component. In those schools the package developer planned and facilitated the package related professional development. While principals of those schools were actively involved in their school’s professional development, their role was as a participant, rather than leader.

Some principals sought consistency in teaching methods, understandings, and knowledge across the school, and believed that could be achieved with school-wide professional development focusing on the use of the package. Furthermore, a number of principals, having identified what they considered to be significant gaps in teachers’ pedagogical content
knowledge in writing, grammar, phonics, spelling, and reading comprehension, attributed package usage to successfully addressing teachers’ lack of knowledge. Again, the freedom of choice – a characteristic of neo-liberalism - was apparent as principals chose the focus and mode of delivery of their professional development programmes.

External accountability.
Principals purchased a package to meet literacy targets in reading, spelling, and writing. A modification of two packages by the package developer gave principals a sense of security and confidence that they were able to show how they were teaching the curriculum and meeting the newly mandated national standards, a political initiative that focuses on teacher and school accountability.

The intensification of teachers’ work.
Some principals purchased a commercially produced package as a solution, in part, to address the intensification pressures of their teachers resulting from increased demands for accountability, the increasing complexity of teachers’ work and the burden in trying “to meet a greater range of targets” (Galton & MacBeath, 2002, p.13).

The over-arching finding: The impact of neo-liberalism
The over-arching finding of this study is that the neo-liberal school reform policies of the last 25 years have, in large part, driven the use of commercially produced packages. The combined effect of these policies and reforms has been momentous, increasing the autonomy of principals, while at the same time, intensifying requirements for evidence of school effectiveness (Codd, 2005, Fiske & Ladd, 2000). Three outcomes in particular have played a part in changing principals’ roles, responsibility and working conditions. One, under the “old order”, pre-Tomorrow’s Schools, virtually all professional development was provided and delivered by the then Department of Education and regional education boards. Suddenly, with the introduction of Tomorrow’s Schools, that changed and professional development became the responsibility of principals (Lange, 1988). Two, principals, exercising their autonomy and responsibility for professional development, were, for the first time, also able to determine curriculum delivery. Three, the Tomorrow’s Schools reform brought in the first of a series of policies (e.g., the establishment of the Education Review Office, the reporting of annual targets in 2003, the mandating of national standards in 2010). The impact of each
incrementally increased the demands for schools to be accountable for the achievement of their students.

This juxtaposition of increased principal autonomy and tightened accountability led to principals exercising their independence to choose an externally produced package to address ever-increasing workload pressures and accountability demands. The combined impact of those three school reform outcomes has, over time, driven and shaped the curriculum delivery decisions of some principals about the use of “prepackaged commercial material” (Apple & Jungck, 1992, p. 29) for the teaching of literacy.

Section Two: A Comparison Between the Two Groups of Principals

When reflecting on the main findings related to principals’ reasons for using or not using a commercially produced literacy package, the diverging beliefs of the two groups of principals became evident. Revisiting the data confirmed that with each of four broad topics, namely, the place of phonics in the reading programme and the impact of the reading wars; the professional development of teachers; the intensification of teachers’ work; and increased demands for accountability, the perceptions and responses of principals were similar as a group and widely different from those of the other principal group.

The place of phonics.

The place of phonics in the reading programme was viewed very differently by the two groups of principals. In 2010 Dunedin primary schools had subscribed to one or other of the two opposing early reading instruction positions highlighted by the long-lived, ongoing reading wars. Most principals using a package purchased it to ensure their teachers implemented a systematic phonics programme. In making that decision, their students followed a pre-planned sequence for learning letters and sounds and each letter and its associated sound were taught explicitly using a discrete programme. Jolly Phonics, the most popular phonics package, was described by principal SP22 as a “great teaching tool” and principal SP23, noting desirable features of Sounds Alive, another phonics package, stated, “The framework is set and it’s very prescriptive”.

In contrast, the other group of principals, those in schools not using a package, made no mention of teaching phonics. From their references to teacher resource books published by the Ministry of Education and their articulation of beliefs in a whole language and balanced approach to literacy learning, it can be assumed that the teaching of letters and sounds in their
schools was embedded in their reading and writing programmes. For example, principal NP10, summing up the predominate teaching philosophy at her school stated, “We believe in a whole language approach to teaching literacy”. Principal NP3 expressed a similar position stating: “We prefer to use and apply the teaching practices and ideas in publications like Effective Literacy Practice Yr1-4 and Yr5-8 in regard to literacy teaching”. For those schools, the teaching of phonics therefore was not a separate, discrete programme.

Thus, it was clearly evident that the two groups of principals had different viewpoints on the teaching of phonics (i.e., a systematic or an embedded approach). Furthermore, by implication, they differed over implementing a pedagogy that explicitly emphasised decoding or one which emphasised using multiple cues (Tunmer et al., 2008, p. 114).

**Professional development.**

The centrality of professional development in the thinking and work of the two groups of principals was evident in the data. They both regarded the professional development of their teachers as “paramount” (principal NP8). A review of the findings, however, highlighted areas of difference between the two groups, namely, the genesis of the professional development focus, the mode of delivery, and the role of the principal.

For some principals, their purchase of two packages widely used in schools (i.e., Sounds Alive and Words Alive), delivered an accompanying provision of prolonged and structured school-wide professional development planned and implemented by the package’s developer. Additionally, the prescriptive nature of these packages promised school-wide consistency in literacy teaching, another attractive feature. Thus, for principals using a package, their professional development delivered two outcomes; teachers learned how to implement the package and, concurrently, acquired new pedagogical content knowledge.

Conversely, that same data showed that principals of schools not using a package held a very different view of school-wide literacy professional development. Like the principals of schools with packages, their professional development process began by identifying teacher needs. But, unlike the other principals, they developed their own professional development curriculum and made decisions as to how that professional learning would be structured and delivered. For example, one principal described how teachers worked cooperatively with neighbouring schools to hone their assessment skills - a lengthy process. In another school,
while the entire staff had the same focus, teachers individually and in small groups, accessed and learned about new pedagogies in a variety of ways.

While both groups of principals were involved in their school’s professional development programme, their roles differed. Principals in schools using packages with a pre-planned professional development programme were actively involved as participants as it followed the structure set by the package’s developer. In contrast, principals in schools not using a package led their school’s professional development, or along with senior teachers identified teachers within the school, or external literacy experts with the skills and knowledge to provide leadership and input.

The use of an expert external to the school was another area of difference. Principals using two packages with a professional development component perceived the package’s developer as an expert because of her knowledge of the New Zealand curriculum, her experience as a primary school teacher, her knowledge about language, and her ability as a dynamic presenter. She alone planned and facilitated their professional development programmes. Principals not using a package also used outside experts to facilitate or participate in the school’s professional development. Their experts came from the University of Otago College of Education, School Support Services, or Ministry of Education Professional Development contracts.

There was a marked difference in the way principals described the professional qualities of their teachers. Principals in schools with packages had identified specific gaps in teachers’ knowledge of phonics, grammar, and the teaching of writing and comprehension. They were convinced that these gaps were impeding students’ learning and believed that using a package would increase teachers’ pedagogical content knowledge. For example, principal SP6 described a package as a “godsend” because it made explicit the teaching of comprehension and principal SP20 considered the school’s packages as “on-going PD development to inform and raise teacher capability”.

In stark contrast, principals not using a package held no such concerns about their teachers’ knowledge or skills. Instead, they described them as “very experienced teachers” (principal NP3), “experienced classroom practitioners who use a variety of strategies and resources to support children in their literacy learning” (principal NP6), “a talented, experienced and knowledgeable group” (principal NP11), and noted their skills “in the teaching of literacy
(principal NP3), their Reading Recovery training (principal NP10), and their passion for literacy (principal NP11).

The data also revealed two distinct viewpoints concerning teachers’ professional development. For those schools using a package, professional development centred on the package pedagogy while simultaneously lifting teachers’ content knowledge. On the other hand, schools not using a package accepted responsibility for their own literacy professional development and perceived it as an ongoing process of professional learning as they reviewed teacher strengths, refined practices and learned new pedagogies.

**Intensification of teachers’ work.**

Some principals purchased a package as a means of coping with the intensification of teachers’ work. They believed that packages with their pre-planned lessons, prescribed pedagogy and readymade resources could save time for “busy teachers” (principal SP10). Packages were viewed as the solution to the “increasing pressure to do more in less time” (Galton & MacBeath, 2002, p. 13). In short, a package, because it is perceived as containing everything needed for a teaching programme, provided those principals with a tangible, robust, and immediate leadership response to the multiple workload pressures confronting their teachers.

Principals in schools without a package, while in agreement about workload pressures and the expectation “to do so much more in terms of delivering the curriculum” (principal NP2), were not attracted to packages. Their beliefs about child-centred education and effective practice, the role of the teacher, programme development, and ownership, and whole language philosophy and practices were incongruent with the prescribed pedagogy of packages.

Another closely related finding concerning package usage and intensification, and one that also shows a strong disparity between the two groups, is the impact that intensification has on teachers and principals’ loss of confidence and reliance on experts (Apple, 1993). Principals with packages seemingly readily conferred the status of expert on Resource Teachers of Learning and Behaviour and a Speech Language Therapist. They acted on their recommendations and purchased specific commercially produced packages. On the other hand, principals in schools without packages did not speak about experts and gave no indication that any school support personnel had made recommendations of packages to them.
**External accountability.**

Both groups of principals, that is, those who had a package in their school and those who did not have a package, experienced the same external demands for student achievement data required to make the work of schools public and transparent. However, the response of the two groups of principals to these accountability demands was strikingly different.

All principals, having collated assessment data to identify areas of strength and weakness in student learning, are required to set targets to lift student achievement and then to report progress in meeting these targets in the board of trustees’ annual report, a public document. While both groups of principals worked on the premise that teachers needed to make changes to their programmes in order to raise student achievement levels, they developed different solutions. Principals of schools with a package purchased it to assist teachers meet targets in phonics, reading, spelling and writing believing that a package would provide structure and direction for teachers. In contrast, principals in schools without a package linked their professional development programme and teachers’ appraisals to their student achievement targets.

As with intensification, the data revealed a link between principal confidence and package usage. Principals of schools using a package articulated a sense of confidence and security at being able to furnish what they considered to be robust student data for the purpose of external auditing. In other words, their package and its data collection procedures provided reassurance that their student achievement data was indeed credible.

In contrast, principals of schools not using a package, while discussing accountability practices, made no comments that suggested concerns or feelings of insecurity. Like the principals of schools with packages they were trying to come to terms with the newly introduced National Standards. But it could be construed they were not unduly concerned about their capacity to provide evidence that their students were attaining desired curriculum levels.

**Section Three: Suggestions for Further Research**

Given that 50 % of Dunedin primary schools were in high socio-economic communities (decile ratings 8-10), and that 43% of the schools were small to very small with less than 100 students, the finding to question one about package usage in Dunedin primary schools cannot
be generalised to the use of literacy teaching packages in other places or parts of New Zealand with very different demographics. Thus, questions for further research might ask: how would package usage in cities or places with different demographic profiles compare to that of Dunedin? How widespread is the use of commercially produced literacy packages in other parts of New Zealand, for example, rural Otago?

Question two inquired into reasons principals chose to purchase and use a package to teach part of the school’s literacy programme. It did not ask how teachers used the package. Central to an investigation about how packages are used are questions about teachers’ acceptance or rejection of a highly prescriptive pedagogy. For example, *Jolly Phonics*, the most widely used commercially produced package in Dunedin primary schools, provides a detailed prescriptive programme for the first eight to nine weeks of schooling. Its handbook (Lloyd, 2005) gives detailed instructions for teaching one new letter sound each day in this period. The order of the letter sounds is stipulated along with the lesson procedure and the time span for teaching. Therefore, questions arise. Are teachers who implement this package using it precisely as the package’s developers have prescribed and teaching one new letter sound a day during the first eight to nine weeks, or, are teachers selecting parts of the package and incorporating them into the programme they have developed to teach their students about phonics? Are teachers exercising agency and changing the package’s prescription (Apple, 1986; Ballet & Kelchtermans, 2008)?

Whose pedagogy is privileged - that of the developers of a package such as *Jolly Phonics* or that of the classroom teacher? If the teacher implements the prescriptions and lessons of the package, clearly the developer’s pedagogy prevails. The teacher has implemented the developer’s programme. But, if the teacher, in planning lessons for his or her students, selects suggestions, or particular lesson content from the package and incorporates them into his or her own planning, then it is the teacher’s pedagogy that prevails. In that case, the teacher is using the package as a resource and not as a readymade programme. Thus, another question for further research is - How are classroom teachers using a commercially produced package for the teaching of literacy?
Concluding statement

This study asked two questions. The first inquired about the prevalence of package usage. Based on descriptive data from every school in the population of Dunedin schools, the answer is it is widespread with three out of every five schools using a literacy teaching package. School types with the highest package usage include full primary, integrated, low socio-economic and large and medium large schools. The second question asked why schools decided to purchase a teaching package. The rich text data collected and analysed contained substantial insights as to why principals decided to use a literacy teaching package, including the teaching of phonics, addressing gaps in teachers’ pedagogical content knowledge, professional development, and as a means of addressing the intensification of teachers’ workloads.

The answers to the two research questions provide a solid basis for inquiry as to how schools use commercially prepared packages for the teaching of literacy.

“It is not only by the questions we have answered that progress may be measured, but also by those we are still asking” (Freda Schaffer Adler, 1975).
References


Annan, B. (2009). Schooling improvement since Tomorrow’s Schools. In J. Langley (Ed.), *Tomorrow’s Schools 20 years on...* (pp. 91-104): Auckland, New Zealand: Cognition Institute.


Tunmer, W., & Chapman, J. (1993). To guess or not to guess, that is the question: Metacognitive strategy training, phonological recoding skill, and beginning reading. Reading Forum, 1, 3-14.


## Appendix 1. Copy of Questionnaire

<table>
<thead>
<tr>
<th>School: ____________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person(s) providing information about the school’s use of a commercially produced package(s) for the teaching of literacy</td>
</tr>
<tr>
<td>Name: ____________________  Designation: _________</td>
</tr>
<tr>
<td>Name: ____________________  Designation: _________</td>
</tr>
<tr>
<td>Date questionnaire completed: ____________</td>
</tr>
</tbody>
</table>

### OPENING QUESTION

Is this school currently using a commercially produced package for the teaching of literacy?

Please tick [✓] one box:

- [ ] **YES** ⇒ *If ‘YES’, proceed to page 2 and complete the questions in Section One only (i.e., the blue pages).*

- [ ] **NO** ⇒ *If ‘NO’, proceed to page 5 and complete the questions in Section Two (i.e., the yellow pages).*

- [ ] **DON’T KNOW** ⇒ *If ‘DON’T KNOW’, there are no further questions for you. Please put the survey in the envelope provided and seal, in readiness for collection. Thank you.*
**SECTION ONE**

*If your school is currently using a commercially produced package, please respond to the following questions.*

1. **Which package(s) is the school using this year?**

   *Please tick [✓] boxes that apply.*

   - Jolly Phonics [   ]
   - Letterland [   ]
   - Sounds Alive [   ]
   - Words Alive [   ]
   - Other(s) [   ] Please write name(s) of package(s) below…

   ____________________________________________________________
   ____________________________________________________________

2. **What year level(s) is the school using the package(s) with?**

   *Please tick [✓] boxes that apply.*

   Please write names of package(s) (below)

   - Year One [   ] __________________________
   - Year Two [   ] __________________________
   - Year Three [   ] __________________________
   - Year Four [   ] __________________________
   - Year Five [   ] __________________________
   - Year Six [   ] __________________________
   - Year Seven [   ] _________________________
   - Year Eight [   ] _________________________

   *Comment/explanation [optional]*
3. What were the main reasons the school decided to use a commercially produced package (or packages) for teaching literacy?

[Note: Please feel free to use bullet points, write brief notes, etc]

4. In the course of this school year (i.e., 2010) and/or the previous four school years (i.e. 2009, 2008, 2007, 2006) has the school ceased using one package and begun using a different package?

Please tick [ √ ] one box

Yes [ ] ⇒ Please proceed to Question 5 on the next page.

No [ ] ⇒ Please proceed to Question 6 on the next page.

Don’t know [ ] ⇒ Please proceed to Question 6 on the next page.
5. What package(s) did the school use previously?

Please tick [✓] boxes that apply.

- Jolly Phonics [ ]
- Letterland [ ]
- Sounds Alive [ ]
- Words Alive [ ]
- Other(s) [ ] [Please give names below]

6. Often school practitioners develop insights about aspects of teaching and learning that researchers have not considered. Is there anything you would like to share about the use of a commercially produced package for teaching literacy?

Please tick [✓] the box that applies to you.

NO [ ] ⇒ There are no further questions for you to answer. You have completed the survey. Please put the survey in the envelope provided and seal, in readiness for collection. Thank you.

YES [ ] ⇒ Please use the space below to briefly record your insight(s).

If you require further space, please write on the reverse side of this page.

There are no further questions for you. You have completed the survey. Please put the survey in the envelope provided and seal, in readiness for collection. Thank you.
SECTION TWO

If your school is not currently using a commercially produced package for teaching literacy, please complete the following questions.

1. Although this school is not using a commercially produced package (or packages) this year (2010), has it used a package (or packages) for the teaching of literacy in any or all of the previous four school years (i.e., 2009, 2008, 2007 and/or 2006)?

Please tick [✓] one box

YES [ ] ⇒ If ‘YES’, complete the remaining questions in this section only (i.e., the yellow pages).

NO [ ] ⇒ If ‘NO’, proceed to page 7 and complete the questions in Section Three only (i.e., the green pages).

DON’T KNOW [ ] ⇒ If ‘DON’T KNOW’, please proceed to page 6 and complete Question 3

2. What package or packages have you used in the previous four school years?

Please tick [✓] boxes that apply.

Jolly Phonics [ ]
Letterland [ ]
Sounds Alive [ ]
Words Alive [ ]
Other(s) [ ] [Please write names of packages below]

_______________________________________________

_______________________________________________

If ‘YES’, complete the remaining questions in this section only (i.e., the yellow pages).

If ‘NO’, proceed to page 7 and complete the questions in Section Three only (i.e., the green pages).

If ‘DON’T KNOW’, please proceed to page 6 and complete Question 3
3. Often school practitioners develop insights about aspects of teaching and learning that researchers have not considered. **Is there anything you would like to share about the use of a commercially produced package for teaching literacy?**

Please tick [✓] the box that applies to you.

**NO** [ ] ⇒ **There are no further questions for you to answer. You have completed the survey. Please put the survey in the envelope provided and seal, in readiness for collection. Thank you.**

**YES** [ ] ⇒ **Please use the space below to briefly record your insight(s).**

There are no further questions for you to answer. You have completed the survey. Please put the survey in the envelope provided and seal, in readiness for collection. **Thank you.**

**NOTE:** You may be contacted further about the insights you have shared.
SECTION THREE

If your school does not use a commercially produced package for teaching literacy, and did not do so in the school years 2006-2009, please respond to the following questions.

1. Although this school is not using a commercially produced package this year, and has not used one in the previous four years, **has it ever considered using a commercially produced package for the teaching of literacy?**

Please tick [✓] one box

YES [ ] ⇒ If ‘YES’, please complete the following two questions (i.e., questions 2 & 3).

NO [ ] ⇒ If ‘NO’, please proceed to Question 3, the last question, on the next page (i.e., page 8).

DON’T KNOW [ ] ⇒ If ‘DON’T KNOW’, please proceed to Question 3, the last question, on the next page (i.e.,

2. When this school was **considering** the use of commercially produced packages for the teaching of literacy, what were the main reasons it decided not to use such packages?

[Note – Please feel free to use bullet points, write brief notes etc.]

If you require further space, please write on the reverse side of this page.

NOTE: You may be contacted further about the reasons you have shared.
3. Often school practitioners develop insights about aspects of teaching and learning that researchers have not considered. **Is there anything you would like to share about the use of a commercially produced package for teaching literacy?**

Please tick [v] the box that applies to you.

<table>
<thead>
<tr>
<th>NO</th>
<th>⇒</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>There are no further questions for you to answer. You have now completed the survey. Please put the survey in the envelope provided and seal, in readiness for collection. Thank you.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>YES</th>
<th>⇒</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Please use the space below to briefly record your insight(s).</td>
</tr>
</tbody>
</table>

If you require further space, please write on the reverse side of this page.

There are no further questions for you to answer. You have now completed the survey. Please put the survey in the envelope provided and seal, in readiness for collection. **Thank you.**

**NOTE:** You may be contacted further about the insights you have shared.
Appendix B: Copy of Letter to Pilot Group Re Trialling Questionnaire

July 6, 2010

Hi --------

Many thanks for agreeing to trial my questionnaire.

For your info: An information sheet will accompany the questionnaire when it is distributed to principals. This sheet will explain the purpose of this study and define commercially produced packages as ‘packages which include a handbook for teachers with information about the specific literacy skills and strategies to be taught, a suggested sequence for teaching, and teaching resources’.

My aim is to produce a questionnaire that is crystal clear – to ensure busy principals have no trouble understanding and answering the questions, and can follow the directions easily and thus answer only those questions that apply to them. (NOTE: I’m anticipating that in most schools it will be the principal who completes the questionnaire. But, it may be that in some schools the questionnaire is given to a DP or a long-serving teacher who knows about the use of such packages in that school.)

Thus, as you ‘do’ the draft questionnaire please adopt a critical stance and write on the questionnaires where a question is not clear, where the wording is not what principals would use, and where instructions to proceed from one question to another part of the questionnaires are confusing or complicated. I need that ‘principal/school-based’ perspective.

Two scenarios: Please read the draft questionnaire and imagine that…

1. You are the principal of a school that is currently using a commercially produced package to teach literacy;
2. You are the principal of a school that is not currently using a commercially produced package to teach literacy but used one in the past.
I’m providing two copies of the draft questionnaire for you to use – one for each of the two scenarios.

With many thanks.

*Ros*
Appendix C: Feedback From Trial Questionnaire

Background

Five people were invited to trial the survey to ensure the questions and the directions are crystal clear. None of these five people will be part of the research population.

Each person was given two copies of the draft survey and a covering letter (see below) that asked them to adopt a critical stance as they completed the survey according to two imaginary scenarios, e.g. You are the principal of a school that is currently using a commercially produced package to teach literacy; You are the principal of a school that is not currently using a commercially produced package to teach literacy but used one in the past.

Their suggestions and comments are summarised below along with the researchers’ follow-up to suggested changes to the survey:

<table>
<thead>
<tr>
<th>Pilot group member</th>
<th>Scenario</th>
<th>Overall statements</th>
<th>Suggestions/comments</th>
<th>Action</th>
</tr>
</thead>
</table>
| Member A           | 1.principal of a school **currently using** a package; 2.principal of a school currently **not** using a package - used one in the past. | Easy to follow; questions are very clear. | **Section One; Q. 2**  
Is there a need to differentiate which years use which package?  
**Section One, Q 3**  
Is there a need to add question about the data schools used to help make decision?  
**Section One Q 5**  
Do you want to know what package schools changed to? | Will add instruction to include name of package.  
Will not add a question - I want to see what principals volunteer.  
Do not need this info.  
This information will emerge in a more depth in an interview. |
| Member B           | 1.principal of a school **currently using** a package; 2.principal of a school not currently using a package and **has never considered using one.** | “Very straightforward for those reading it.” | **Section 3, Q 3**  
The first sentence is inherent in the following statement – *Is there anything you would like to share...* Is the first sentence necessary? | Will include first sentence. |
| Member C           | 1.principal of a school **currently using** a package; 2.principal of a school currently **not** using a package but **considered using one** in the past. | “All 'chains or links' work well.” | **Scenario 2**  
Section 3; Q 1  
If a person answers ‘Don’t know’ they are directed to Q 3. Do they need to answer this?  
Could it be the same as in Scenario 1? | Will change the directions for those who don’t know if the school if the school used a package in the past. They will now go from Question 1, p.5 to Section 3 on p.6. |
| Member D       | 1. principal of a school **currently using** a package;  
                  2. principal of a school **not using** a package but **did use one** in the past. | “Straight forward” | **Opening question** Not sure whether ‘this’ or ‘the’ or ‘your’ is best word. | Purpose of first sentence is to affirm practitioners. Will keep reword to have a similar statement. |
|---------------|-------------------------------------------------------------------------------------------------|-------------------|---------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Member E      | 1. principal of a school **currently using** a package:  
                  2. principal of a school **not using** a package. | “Easy to read”    |                                                                                  |                                                                                                  |
Appendix D: Procedures For Delivering Questionnaire to Schools

Thank you for agreeing to deliver my questionnaire. Your help in personally delivering and collecting the questionnaires is greatly appreciated and should ensure that school participation in the questionnaire is at high levels.

Background to research questions

When teaching at the University of Otago College of Education, I received questions from a large number of BTchg students about the use of commercially produced packages for teaching reading and writing in primary classrooms. On one occasion approximately 24 out of a class of 28 students had a practicum in a classroom where the teacher used a package to teach either reading or writing. Students commented that they had no prior knowledge of the objectives of these packages or how to use them. In asking questions and making those comments the students identified a gap in the BTchg curriculum and that prompted me to learn more about the use of these packages. Consequently, my MA research seeks to answer the following two questions: (i) How widespread is the use of commercially produced packages in teaching literacy in Dunedin primary schools? and, (ii) Why do schools choose to use a commercially produced literacy package?

I am surveying all state and integrated primary schools in the following Dunedin city school clusters – Dunedin West, Dunedin South and Dunedin North – a total of 42 schools. My aim is to have a 100% return rate of questionnaires.

Guidelines for the delivery and collection of the questionnaire

1. Introductions: Please introduce yourself to the principal and explain your role in the distribution and collection of the questionnaire.
2. Give a brief explanation of the background of the study (see above) and explain that, because Ros Hughes is now teaching in the Upper Clutha area, she is unable to deliver the survey herself.
3. Explain how to complete the survey beginning with the…
   • Information sheet: Ensure that the principal sees the Information Sheet and give a brief resume of its contents. In particular, draw the principal’s attention to the following:
• The definition of a commercially produced package (in bold). Please read that
definition to the principal.

• Point out the contact details for Ros or Greg in case there are any
questions/concerns.

- **The Questionnaire:** Explain that the principal or teacher completing the
questionnaire will first complete page one of the questionnaire, namely…

  - By entering the name of the person completing the questionnaire and the date
of completion. (Note: This information will not be reported.)

  - By answering the OPENING QUESTION. This question requires the person
to tick one of three responses, namely, (i), Yes, (ii), No, or (iii), Don’t Know.

- **Depending on the answer to the Opening Question,** the person completing the
questionnaire will then answer the questions in either Section One, or Section Two or
Section Three. In other words, he/she completes only one section. This will involve
responding to between 3 to 6 further questions.

4. After completing the questionnaire, the principal/ teacher places it in the enclosed
envelope and seals it to maintain confidentiality.

5. Please make an arrangement with the principal for you to collect the completed
questionnaire. (Note: The completed questionnaire could be left with the school secretary
for you to collect.)

6. Record the drop off and pick up dates on the attached sheet detailing the schools you will
contact.


With sincere thanks for your assistance.

Ros
Appendix E: Interview Questions

CONSISTENCY

A recurring theme among the survey returns from principals is that consistency in the teaching of literacy across the school is important. Some principals talked of consistency in terms of a common teaching approach; others, as teachers sharing the same fundamental knowledge and understandings. And yet another meaning of consistency is having procedures and data that enable school-wide consistency in the assessment and measurement of student literacy learning.

In the words of one principal of a school that uses a package - “We wanted a school wide approach to develop common understandings, attitudes and knowledge. There was no school wide consistency in knowledge or expectation.”

What is clear in the survey data is that many of the principals of schools using a package believe that the package does assist, or enable, their school to achieve consistency.

My question is…

- Does the package you are using help you achieve consistency?
  For schools not using a package, and, probe (if required, for other schools)…

- How important is consistency in the teaching of literacy to you?

PROFESSIONAL DEVELOPMENT

Professional development about the teaching of literacy was yet another recurring theme in the survey data. 42% of schools using a package, commented positively on the professional development that was provided by the developer or publisher of the package they are using. Many of these schools found this support for teachers to be very helpful and, in some cases, it was a key factor in deciding to select a particular package.

In the words of one principal - “We were impressed with the whole-school PD and intensive in-school support”.

My question is…
• With the package you are using, is there PD and support provided for your teachers?

Probes…

• Is that PD a one off, namely, provided in the first year of use of the package, or is it on-going year by year?
• Thinking back to when this school decided to use a package for the teaching of literacy, did the provision of PD influence your decision to purchase the package?
• Is there anything else you would like to add about the PD and/or support provided by the publisher/producer of the package you are using?

For schools not using a package…

• How do you provide professional development in literacy for your teachers?

SCHOOL TARGETS

Identifying curriculum strengths and weaknesses, and setting subsequent targets for learning, is an important part of a principal’s job. A number of principals of schools using a literacy package, commented on school targets in the survey returns and talked about lifting student achievement in reading, spelling and writing.

For schools using a package…

My question is…

• Did you purchase the package you are using to lift student achievement in a specific area of literacy?

Probes…

• Is the package proving to be effective in terms of lifting student achievement?
• What sort of data does the package provide and how do you use it?
• Is there anything else about the use of packages and school targets that you would like to share?

For schools not using a package…
• How do you ensure your school meets literacy targets?

PURCHASING A PACKAGE - WHAT DO THE NEIGHBOURS SAY?

Another theme in the survey data was the influence of neighbouring schools and/or a resource teacher in the decision to purchase a specific package. A numbers of principals commented that they sought advice from schools already using a package before they made a decision to purchase a package for their school.

In the words of one principal, “Obviously, it is important to seek advice from current users with commercial products such as these. It is easy to promote them and make them sound better than they actually are.”

My question is…

To what extent did you seek advice/information about packages from other schools and/or other education practitioners?

For schools not using a literacy package…

• Is there any exchange of ideas/resources in the teaching of literacy between your school and neighbouring schools?

CURRICULUM TENSION

This question, and it is a broad one, seeks your opinion on what has been called by some, a point of tension between two very different perspectives on the literacy curriculum. For instance, there are some schools that hold fast to what was, 10-15 years ago, accepted New Zealand practice whereby each school developed its own literacy curriculum for its students and then set about teaching that curriculum. That practice is known as whole language or balanced literacy and has, at its heart, teachers matching their teaching (and resources) to the strengths and learning needs of their students.

On the other hand, as we see today, there are an increasing number of schools who, after identifying the strengths and learning needs of their students, purchase part or all of their literacy curriculum from outside developers and then, like the others, they set about teaching literacy.
In the minds of some, there is a real point of tension between these two curriculum perspectives.

**My question is…**

- **What are your thoughts on this so-called point of tension?**

**CLOSING QUESTION**

- **Finally, is there anything else you would like to share about the use of commercially produced packages in the teaching of literacy?**
# Appendix F: List of Packages Used in Schools

<table>
<thead>
<tr>
<th>Name of package</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Jolly Phonics</strong></td>
<td>jollylearning.co.uk</td>
</tr>
<tr>
<td><strong>Letterland</strong></td>
<td><a href="http://www.letterland.com">www.letterland.com</a></td>
</tr>
<tr>
<td><strong>Lexia: Smart Phonics; Smart Kiddies Nessie</strong></td>
<td><a href="http://www.leaxialearning.co.nz">www.leaxialearning.co.nz</a></td>
</tr>
<tr>
<td><strong>P M Writing Programme</strong></td>
<td><a href="http://www.nelsonprimary.com.au">www.nelsonprimary.com.au</a></td>
</tr>
<tr>
<td><strong>Probe: Key into Theory Key into Reorganisation</strong></td>
<td>Comprehenz.com/keyreorganisation</td>
</tr>
<tr>
<td><strong>Sounds Alive</strong></td>
<td><a href="http://www.righttoread.co.nz/sounds-alive">http://www.righttoread.co.nz/sounds-alive</a></td>
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<tr>
<td></td>
<td>(no longer able to be accessed)</td>
</tr>
<tr>
<td><strong>Spelling Made Easy</strong></td>
<td><a href="http://www.spellingmadeeasy.co.uk">www.spellingmadeeasy.co.uk</a></td>
</tr>
<tr>
<td><strong>Steps to Literacy</strong></td>
<td><a href="http://www.learning">www.learning</a> staircase.com</td>
</tr>
<tr>
<td><strong>Spelling Under Scrutiny Switch into Spelling</strong></td>
<td>spelling.co.nz</td>
</tr>
<tr>
<td><strong>Words Alive</strong></td>
<td><a href="http://www.righttoread.co.nz/words-alive">http://www.righttoread.co.nz/words-alive</a></td>
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