Teacher Autonomy and Lesson Planning

Anne Shields
Bard Early College
and
Madhu Narayanan
Portland State University

Abstract: Teacher autonomy is an important construct that shapes how educators feel about their work within schools and classrooms. This paper explores how teachers' felt sense of autonomy affects their lesson planning process. We conducted semi-structured interviews with a group of four teachers who utilized different approaches to lesson planning. Key findings point to the important role of individual school contexts, the impact of teachers' existing pedagogical and content knowledge, and the unique discourses teachers adopt in describing their process.

Autonomy is a fundamental human need alongside feelings of belonging and competence, all three of which work together to shape human motivation (Deci & Ryan, 2000). For educators, autonomy can be thought of as the degree to which they control their actions in their work environment (Pearson & Moomaw, 2006). Perceptions of autonomy vary across the many different domains of a teacher's work (Wermke & Forsgard, 2017; Ingersoll, 2009), as teachers are tasked with both working in their classrooms and working as members of a larger school community. Autonomy is a complex construct — it is not quite an objective measure of decision-making authority but rather a perception of control (Erss, 2018; Frase & Sorenson, 1992).

Teacher autonomy can relate to many positive attributes, including job satisfaction (Worth & Van den Brande, 2020), retention (Fernet et al., 2014), increased empowerment, and lower stress (Pearson & Moomaw, 2005). However, teachers generally express a lack of autonomy related to many of their professional roles. They have little influence in domains of school operations, including deciding rosters, electing which grade or subject to teach, or school-wide policies on behavior (Hargreaves, 2000; Lortie, 1975; Worth & Van den Brande, 2020; Ingersoll, 2009). This dynamic is one reason schools have historically been described as "loosely coupled" systems, where teacher responsibility is controlled in exchange for considerable freedom within the classroom (Ingersoll, 2009). Other structures that regulate teachers' autonomy related to curriculum include textbooks and scripted reading programs. Requiring teachers to follow such books/programs has been stigmatized as effort to de-skill the profession (Ball & Feiman-Nemser, 1988; Shannon, 1987). More recently, a shift towards high-stakes accountability has brought increased regulation and monitoring of teachers' work, including the mandated use of scripted lesson plans (Valli & Buese, 2007; Hargreaves, 2000).

Despite its apparent benefits for teacher morale, autonomy is a complicated construct within education. Teachers are public agents, responsible to both the students they serve and the general public. Their autonomy inevitably will be placed against larger institutional goals or family goals, thus raising deeper questions of the interplay of control, freedom, and the state (Lennert da Silva & Mølstad 2020; Wermke & Salokangas, 2021). Additionally, not all teachers may perceive autonomy to be completely necessary for their practice. Pitt (2010) argued that, for some teachers, autonomy is interpreted as abandonment without adequate support. Frase and Sorenson (1992) suggested that granting autonomy to teachers is a way for leaders and education departments to avoid their responsibility for ensuring strong teaching.

In this complicated arrangement, some argue that autonomy must be balanced by other structures. Erss (2018) claimed that teachers should be given "complete freedom to choose within limits;" that is, they would be socialized to practice self-regulation and metacognition within a community of practice to support development of their autonomy. Similarly, Cribb and Gerwitz (2007, p. 203) wrote that autonomy and control are overlapping concepts, "autonomy cannot exist in a vacuum but is always exercised within systems of constraints." These ideas are examples of what Wermke and Salokangas (2021) call the "autonomy paradox," where a degree of control is necessary to support autonomy.

Previous studies illustrate how perceptions of autonomy can be highly variable. Researchers from Scandinavia described the complicated relationship between national context and teacher autonomy where teachers have the freedom to adapt mandated curriculum to patterns of learning among their students (Erss, 2018; Mausethagen & Mølstad 2015; Wermke & Forsgard, 2017). A survey of 155 New York City teachers (Narayanan et al., 2024), out of which this study grew, found that autonomy was higher for high school teachers and those who wrote their own lessons, and lower for elementary teachers and those using scripted lessons. However, these general findings about variability leave room to investigate how the actual, lived experience of lesson planning can shape a teacher's perception of autonomy, a gap this paper seeks to explore.

Method

This multi-case study sought to understand how teachers perceive their workplace autonomy in relation to their unique process for planning lessons. Our previous research involved interviewing 18 participants as a follow up to a survey of 155 New York City educators (Narayanan et al., 2024). We conducted semi-structured interviews with participants who opted in after completing an initial survey on autonomy. All interviews took place on Zoom and lasted 30 to 45 minutes. We asked teachers about their lesson planning process (where, when, how); expectations for lesson planning (scripted lesson plans, scope and sequence, write from scratch), and what models of support were present within their schools. Our final interview question asked participants to rate their sense of autonomy on a scale from 1-10, and participants reported a wide range of scores. As we asked this question, we followed Pearson and Hall's (1993, p. 172) original teacher autonomy survey in formally defining autonomy for our participants as the "extent to which you select learning goals, have control over this process, over your materials, and over what you ultimately teach in your class."

The current study selected four of these teachers for a case study analysis to more closely explore the relationship between autonomy and lesson planning. All four participants instruct secondary students at the middle or high school level; but each participant in this study teaches a different grade and subject area. These participants work in three school models — charter management organization (CMO), independent charter, or traditional district school — and their lesson planning processes are similarly varied, including writing plans from scratch, receiving scope and sequence, or receiving scripted lesson plans. Participants were strategically selected as cases who work across settings with a range of approaches to lesson planning, thus allowing us to better explore factors that inform their sense of autonomy. Based on comments made during the interview process, we also chose teachers who expressed different levels of content knowledge related to the subject area they taught.

After transcribing interview responses, we created a comprehensive deductive codebook based on themes of lesson planning, accountability, and Deci and Ryan's (2000) self-

determination (autonomy, competence, and relatedness) scale to drive our analysis (Saldaña, 2021). To strengthen the reliability of our coding and interpretation, we first compared our independent coding of one transcript (Braun & Clarke, 2013). After sharing our codes and resolving different interpretations, we established an inter-rater reliability of 92%. We then continued coding the remaining transcripts. During that process, we listened to recordings of the interview to ensure accuracy. After coding, we individually drafted detailed memos for capturing reflections. We both have experience in various teaching and administrative positions in New York City schools, working in both district and charter schools. Our own experiences and positionality as teachers and teacher educators undoubtedly shaped our interpretations. This iterative process of coding, reflection, and discussion allowed us to develop confidence in our interpretations of the data and address potential biases that may result from our positionality as researchers.

<u>Results</u>

Each teacher articulated nuanced perspectives about their planning process, as well as variables that impacted their sense of autonomy related to drafting lessons:

Rafael: Rafael teaches 10th-grade neuroscience at a traditional district school after his previous career as a genetics researcher. He is in his second year of teaching. Ninth and tenth graders in his course can receive an advanced Biology credit. He works as part of a consortium of schools where he collaborates with other educators who teach the same subject. Rafael works with a co-teacher but takes on most of the planning himself. Rafael does not submit his lesson plans to anyone. He stated his administration fosters a community of trust and emphasized that he appreciates this element of school culture: "I don't do well with micromanaging." He is also aware that this freedom and trust are highly connected to not teaching towards a state exam: "So it's a very unique system, you know, not having to teach for the Regents, as well. So, it gives me a lot of freedom with what I teach and how I teach it." Such a sense of freedom from the constraints of institutional structures within and outside of his school is a key factor influencing his autonomy.

Rafael's planning process is complex. It involves finding sources on the internet, drawing on the work of a previous neuroscience teacher, accessing a collection of plans from the Franklin Institute of Neuroscience, and using a template for his unit planning. He completes most of his planning on weekends, citing evening commitments, such as graduate school, interfering with his week-time productivity. He takes pride in his efforts in planning claiming, "I have built a lot of my curriculum myself." His planning efforts, including creating detailed scripts, challenge the norms of his school. Other teachers have mentioned this difference to him and he reflected, "I feel like everybody I've talked to is like, 'Why are you so hellbent on writing such a detailed lesson plan?' And I get frustrated with that. I'm just like, 'Yeah. Why am I writing like this?' It feels like I'm writing a play almost sometimes. And it's like, 'Do I really need to do all this?' Because a lot of the stuff that I say and do, like everybody needs a plan, always, but, like, a lot of the stuff that comes out there in the lessons is pretty natural. Sometimes I don't even plan it." Still, Rafael derives comfort from a well-thought-out lesson plan, explaining that including talking points and concept maps directly on his written plan helps to ease his anxiety. He rated his autonomy as 10 out of 10. His high autonomy allows for more positive interactions with students. He stated, "the freedom and the support allow me to be the teacher that I am to my students, to be open and goofy with them."

Rita: Rita teaches high school special education at a district school. She is in her first year of teaching but comes to the profession with several years of experience, having served as a tutor since she was 14. Now, as a teacher, she experiences teaching in a heavily institutionalized context. In her context of a district school, there is a degree of autonomy, but it is complicated by her role as a special education teacher. Rita does not submit her lesson plans to anyone but collaborates with several different co-teachers in her classroom and is sometimes dependent on materials from them. She has one mandated co-planning meeting with each teacher every week but said that planning is often done independently after school or at home. These co-teaching structures don't support her having the type of impact she would like related to lesson planning: "the lack of accountability between these interpersonal relationships that I have doesn't allow for it to be as successful as I would like it to be." Rita appears to want more structure to support her collaborative lesson planning efforts outside of what her school currently provides.

The union-negotiated rules are in the background of her lesson planning process. Although she creates lesson plans, the administrators cannot inspect them unless a teacher is being observed. Ultimately, such regulations contribute to her conflicted relationship with the concept of autonomy. The union rules produce a degree of freedom and structure, but they also create murkiness. Rita seemed reluctant to admit that she craves more structure, mandated partnerships, and oversight: "I'm happy that the union allows us to have so much freedom in terms of how we plan our lessons… and the way that we can run our classroom. But I also think that with all that freedom, it's kind of easy to take advantage of, and that's just what I'm feeling at the moment."

Rita's overall autonomy score stated in the interview was a 3 or 4 out of 10. There are two cases where she felt more autonomy. One was when she had to take more of a lead while teaching to complete a graduate school assignment. The other was related to a successful lesson she planned for the one class she teaches on her own. She described in detail how planning for her students made her feel she was making a real difference. She included differentiation, creativity, student choice, and noted the impact that providing opportunities for student-autonomy helped to increase engagement. Overall, she seemed to have a positive experience creating her own lessons, "I kind of enjoy it… because I have that freedom, it's very… it can be very personal to me, and I just feel like this is something that I can produce. Like, this is how I would imagine teaching." Clearly even small moments of freedom can positively impact teachers' autonomy and overall affect in the classroom.

Lilliana: Lilliana teaches at an independent charter school. She is a first-year classroom teacher, writes her own lesson plans, and is responsible for submitting them to her supervisor. Her assistant principal, who she described as her "indirect supervisor" provides feedback after reviewing the lesson plans that she submits every Wednesday. She expressed feeling stressed as a novice educator, claiming her administration said, "You just need to be on top of it. This is what it's like to be a first-year teacher like you need to work more than 40 hours a week." This pressure from the top negatively influences Lilliana's feelings as a professional. Despite the role of administrators, she expressed mixed opinions about the impact of their oversight related to student performance on quarterly interim assessments. She states, "We're fully criticized by our bosses for the data;" but goes on to emphasize how this system of accountability motivates her to be more mindful about her lesson planning. She described receiving contradictory guidance about from which previous years' courses she could re-use lesson materials and which lessons she needed to write from scratch. Lilliana also receives support from a coach who comes to the school a few days per week.

Lilliana teaches Government at multiple levels and is paired with another first-year teacher. Her school is a unionized charter and only requires teachers to submit their lessons a few days per week. She expressed ambivalence about the amount of time she spends planning, "I spend like a really long time on each lesson plan. And that's been hard because I just don't have enough time in the day, and I'm obviously not being paid for all that." She works with a co-teacher in certain classes and expresses how she and the teacher with whom she is paired have "different levels of commitment to the job." She goes on to emphasize that "Chat GPT is like the co-teacher that I need." Clearly, Lilliana is looking for more support to strengthen and streamline her day-to-day planning process. Lilliana rated her autonomy at an 8 out of 10. However, she expressed mixed feelings when asked to elaborate on this rating. She claims that her freedom allows her to further develop her professional identity and teaching style. However, she also expressed a sense of guilt, stating: "I get imposter syndrome... am I what my students deserve? Do my students deserve a better trained teacher? Like am I doing this correctly?" She later elaborated that "autonomy comes with such a burden."

Deanna: Deanna teaches 6th-grade English at a CMO school. Before teaching she worked for child services as a counselor. She has four years teaching experience and receives scripted lesson plans she is required to teach. She is very aware her curriculum is scripted from an outside company (hired by the charter management organization that runs the school), and, therefore, she has little say in how lessons are designed. "Everything is laid out," she said, and her role is more, as she described it, "following the game plan." In this context, the idea of lesson planning looks very different from the previous cases. For Deanna, planning equals what she calls "intellectual prep." She describes the positive impact of this process, claiming "it's important 'cause it is nice to be planned for potential student mistakes." Deanna is very much aware that if she did not make the effort to be prepared, the restrictions on her responsibilities would likely increase. To demonstrate her preparation, she turns in annotated lesson plans once a week to show her intellectual prep. Deanna sees this expectation as part of a management structure, one that is helpful. Her coach gives feedback, and as a result her lessons are stronger. She takes the work of supporting her students very seriously, claiming, "I definitely want to teach with fidelity."

The company that produces the scripted curriculum works closely with Deanna's school. Personnel from the company that produces the curriculum were very proud of their results on standardized tests, which were some of the highest in the state. Representatives frequently visit the building and observe her classroom once or twice per week. She is critical of the curriculum in some respects stating, "You know. Sometimes you think about who's in the room making these things like, you know, like, are they really considering the students that it serves?" Her priority is to differentiate the material for the students — most of whom come from under-resourced communities — without lowering the rigor. This takes away from her overall sense of autonomy, which she rated at a 7 or 8. She felt autonomy was higher in previous jobs where she had more freedom to design her own lessons based on the individual needs of her students.

Discussion and Conclusion

Our case study highlighted several key themes. First was the importance of teachers' individual context in informing their autonomy related to lesson planning — particularly the role that co-teaching plays. Second was the role of content knowledge and competence as a key variable that informed autonomy. Lastly was the rich discourse that teachers used to describe their pedagogical planning process.

Teaching Context: Bandura's (1986) theory of triadic reciprocal determinism argues that human functioning is influenced by three factors: behavioral, personal, and environmental. Participants spoke at length about the role of their immediate environment or school context, which came up as a coded response 93 times across interviews. More specifically, the impact of administrative oversight emerged as a key factor that informed teachers' autonomy for lesson planning. Relationships with colleagues or direct supervisors rooted in trust support stronger feelings of autonomy (Narayanan, 2024). Deanna expressed a sense of pride in her work, but the presence of outside visitors from the corporation designing her lessons seems to have a direct negative impact on her sense of autonomy. Lilliana spoke about her school context more than the other three participants. She focused on the role administration has in informing her day-to-day work and is very consumed with her "packed schedule" and "finding time" for things like calling parents, looking at data, or "a million other things." She expressed the need for more systems of support from administration. This contrasts to Rafael, who emphasized how trust from his administrators contributes to his sense of "freedom." Rafael and Lilliana both spoke about the role trusted mentors played in quashing their self-doubt, which positively impacted their overall feelings of belonging in the workplace and motivation towards completing high quality plans.

Co-Teaching: All four of our participants work in co-teaching partnerships, which influences their autonomy. Rita emphasized several times how interpersonal relationships are "complicated," but that she is "working very hard" with her co-teachers to stick to commitments — such as sending lesson plans to one another 48 hours in advance. Rita is a member of a teachers' union, where teachers are only required to submit lesson plans to administration when they undergo a formal observation. However, she claims the freedom the union contract allows creates situations where colleagues take advantage of the lack of accountability. Such a model is in direct contrast to CMOs, where teachers are often mandated to submit scripted lesson plans on a daily basis (Narayanan et al., 2024). Rafael asserted that his co-teacher did not support his lesson planning process. Lilliana emphasized the impact of Chat GPT as her dream co-teacher. Ultimately, there is a need for additional research about how to create structures where teachers within a co-teaching pair feel individually or collectively autonomous as part of their collaborative planning process.

Competence: Teachers see the value of in-depth planning, and our interviews found that a sense of competence was key to teaching. This is consistent with Deci & Ryan's (2000; 2020) self-determination theory, which posits competence as a key need contributing to one's intrinsic motivation. The lesson planning process is difficult, so motivation is a relevant construct to explore. Rita specifically mentioned difficulties in supporting students, stating, "I don't always feel prepared to help them." She feels a sense of guilt about how her background in math helps her to support students in certain contexts better than others. Lilliana mirrors Rita's sentiment, emphasizing how she did not study the content she is teaching and that she is "more or less learning along with them."

Rafael spoke confidently about his competence as a science instructor, which is likely due to his previous experience in the field. He draws a sharp line between his and his co-teachers' content knowledge, arguing that while she is helpful in providing scaffolds "she's not really an expert on the material" and "I'm pretty much on my own." Deanna spoke confidently about her teaching practice and expressed a high degree of pedagogical content knowledge. She has four years of teaching experience under her belt, which is the most out of all our participants. However, since she receives lesson plans that are (pre)scripted, her process looks different from

those of the other teachers. She engages in a process of "intellectual prep" to ensure pre-planned questions meet levels of rigor her students need. Part of this is reviewing materials and making "metacognitive notes" about how students might approach a text or specific question. This allows her to address potential misconceptions that might arise. However, she revealed some ambivalence about both the plans and the structures because they are not always differentiated to support the unique students in her classroom. She states, "If I had creative control over lesson planning there would definitely be things I'd do differently to address those needs."

The Discourse of Lesson Planning: Despite different contexts and levels of competence, all four participants spoke in detail about the lesson planning process. They adopted a unique discourse that related to cultural and social constructions of pedagogical content knowledge (Gee, 2014). When asked about a specific lesson that went well based on her planning, Rita described a class where she gave students their own autonomy to choose sources that were the most interesting to them. Despite the difficulties she mentioned about managing co-teaching relationships, she described her overall planning process in a positive light. When asked to use one word to describe how she feels about her work writing lesson plans she responded "hopeful."

Rafael — who has a strong sense of autonomy related to lesson planning — articulated that his detailed planning process helps to ease anxiety, and that the unscripted moments of understanding in class are a direct result of his detailed planning process. Lilliana mirrored this sentiment, describing several questions she asks herself during the planning process: "How am I going to introduce this? What should this independent practice be? What should the guided practice be? What should we introduce in the mini lesson?" She follows this up with lots of research to find relevant sources since "whatever I write is what happens in class." Future studies could explore teachers' description of the planning process to illuminate trends connecting lesson planning with sense of autonomy. Such an exploration is particularly relevant as an increasing number of AI programs bill themselves as able to replace the traditional lesson plan.

Overall, three key themes emerged from our analysis of coded responses. The first was the role that teaching context can have on teachers' perceptions of their autonomy, due in large part to support structures and other collaborators within the school. The second is the importance of competence — those with the most content knowledge or experience in the classroom expressed higher ratings of autonomy. Lastly, the rich discourse teachers adopt about their planning process is a highly individualized, powerful driver informing their emotional state around the process.

References

Ball, D. L., & Feiman-Nemser, S. (1988). Using textbooks and teachers' guides: A dilemma for beginning teachers and teacher educators. Curriculum Inquiry, 18(4), 401–423. doi:10.1080/03626784.1988.11076050

Berry, J. (2012), 'Teachers' professional autonomy in England: Are neo-liberal approaches incontestable?', FORUM 54 (3), 397–409.

Bandura, A., & National Inst of Mental Health. (1986). Social foundations of thought and action: A social cognitive theory. Prentice-Hall, Inc.

Braun, V., & Clarke, V. (2013). Successful qualitative research: A practical guide for beginners. Sage

Cribb, A., & Gewirtz, S. (2007). Unpacking autonomy and control in education: Some conceptual and normative groundwork for a comparative analysis. *European Educational Research Journal, 6*(3), 203–213. doi:10.2304/eerj.2007.6.3.203

Elwick, A. (2017). Education reform in New York City (2002–2013). *Oxford Review of Education*, *43*(6), 677–694. https://doi.org/10.1080/03054985.2017.1296421

Erss, M. (2018). 'Complete freedom to choose within limits'–teachers' views of curricular autonomy, agency and control in Estonia, Finland and Germany. *The Curriculum Journal,* 29(2), 238–256. doi:10.1080/09585176.2018.1445514

Fernet, C., Lavigne, G. L., Vallerand, R. J., & Austin, S. (2014). Fired up with passion: Investigating how job autonomy and passion predict burnout at career start in teachers. *Work & Stress, 28*(3), 270–288. doi:10.1080/02678373.2014.935524

Forrester, G. (2000). Professional autonomy versus managerial control: The experience of teachers in an English primary school. *International Studies in Sociology of Education* 10 (2), 133–51.

Frase, L. E. and Sorenson, L (1992). Teacher motivation and satisfaction: Impact on participatory management', NASSP Bulletin 76 (540), 37–43.

Gee, J. P. (2014). An introduction to discourse analysis: Theory and method. Routledge.

Hargreaves, A. (2000). Four ages of professionalism and professional learning. *Teachers and Teaching: History and Practice, 6*, 151-182.

Ingersoll, R. M. (2009). Who controls teachers' work? Power and accountability in America's schools. Harvard University Press

Lennert da Silva, A. L., & Mølstad, C. E. (2020). Teacher autonomy and teacher agency: A comparative study in Brazilian and Norwegian lower secondary education. *The Curriculum Journal, 31*(1), 115–131. doi:10.1002/curj.3

Lortie, D. (1975). Schoolteacher: A sociological study. London: University of Chicago Press.

Marshall, J. (1997), 'Personal autonomy as an aim of Education: A Foucauldian critique', in O'Farrell, C. (ed.), Foucault, The legacy, Brisbane, Queensland University of Technology, 592–602.

Mausethagen, S., & Mølstad, C. E. (2015, 2). Shifts in curriculum control: Contesting ideas of teacher autonomy. *Nordic Journal of Studies in Educational Policy*, 2015(2), 28520–28541. Doi: 10.3402/nstep.v1.28520

Mehta, J. (2013). The allure of order: High hopes, dashed expectations, and the troubled quest to remake American schooling. Oxford University Press.

Narayanan, M., Shields, A. L., & Delhagen, T. J. (2024). Autonomy in the spaces: teacher autonomy, scripted lessons, and the changing role of teachers. *Journal of Curriculum Studies, 56*(1), 17–34. doi:10.1080/00220272.2023.2297229

Pearson, L. C., & Hall, B. C., (1993). Initial construct validation of the teaching autonomy scale. *The Journal of Educational Research*, 86, 172-177.

Pearson, L. C., & Moomaw, W. (2005). The relationship between teacher autonomy and stress, work satisfaction, empowerment, and professionalism. *Educational Research Quarterly, 29*(1), 38–54

Pitt, A. (2010), 'On having one's chance: Autonomy as education's limit', *Educational Theory 60* (1), 1–18.

Ryan, R. M., & Deci, E. L. (2020). Intrinsic and extrinsic motivation from a self-determination theory perspective: Definitions, theory, practices, and future directions. Contemporary Educational Psychology, 61, 101860. doi:10.1016/j.cedpsych.2020.101860

Ryan, R. M., & Deci, E. L. (2000). Self-Determination theory and the facilitation of intrinsic motivation, social development, and well-being. *American Psychologist,* 11.

Saldaña, J. (2021). The coding manual for qualitative researchers. Sage.

Shannon, P. (1987). Commercial reading materials, a technological ideology, and the deskilling of teachers. *The Elementary School Journal, 87*(3), 307–329. doi:10.1086/461497

Valli, L., & Buese, D. (2007). The changing roles of teachers in an era of high-stakes accountability. *American Educational Research Journal*, 44(3), 519–558. doi: 10.3102/0002831207306859

Wermke, W., & Höstfält, G. (2014). Contextualizing teacher autonomy in time and space: A model for comparing various forms of governing the teaching profession. *Journal of Curriculum Studies*, 46(1), 58–80. doi:10.1080/00220272.2013.812681

Worth, J., & Van den Brande, J. (2020). Teacher autonomy: How does it relate to job satisfaction and retention?. National Foundation for Educational Research. https://eric.ed.gov/?id=ED604418