

OBAMA'S VISION FOR EDUCATION: USING CRITICAL DISCOURSE ANALYSIS TO
UNDERSTAND THE IDEOLOGY BEHIND THE NON-IDEOLOGY

By

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To all of my teachers

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Abstract of Thesis Presented to the Graduate School
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By

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Education reform is an important political topic, and President Obama continues to emphasize it throughout his presidency. But what is the nature of this reform? What purpose does Obama see for public education in the United States? Answering these questions is an important step in understanding the specific policies that constitute his administration's current push for education reform. To answer these questions, I conduct a critical discourse analysis on three texts that represent President Obama's vision for public education. The first text is the State of the Union speech he gave in 2011, the second text is a policy proposal for the reauthorization of the Elementary and Secondary Education Act, and the third text is a summary of a competitive grant program started in 2009 called Race to the Top. Through careful textual analysis, I attempt to situate the discourse and policies of these documents in the broader context of the philosophy and history of public education. With this data I make claims about the ideologies that inform Obama's campaign for education reform.

CHAPTER 1 INTRODUCTION

Political Context

In November of 2009, people around the world watched in amazement as Barack Obama was elected President of the United States. During his campaign, Obama represented many things to many individuals, but the themes of hope and change resounded throughout. Not simply a referendum on the previous administration, Obama's win signaled a broad, liberal mandate from the voting population on a variety of issues (Jacoby, 2010). Political analysts and lay-people alike shared an excitement to see just how this young, seemingly progressive president would fare in Washington (Harris and Davidson, 2009).

Two years later, Obama and his administration face quite a different political climate. After undergoing a self-described shellacking in the 2010 mid-term elections and depleted from a vicious battle over health care reform, disillusioned supporters are beginning to wonder what happened to the hope and change that Obama represented (Rowland, 2010). Journalists and academics alike have criticized Obama's plan for education reform, pointing out that it does not differ much from the Republican party line he militated against during his campaign (Fish, 2011; Lakoff, 2011). Others have questioned Obama's paradoxical claim to be non-ideological (Au, 2009a). Commenting on Obama's political philosophy, senior advisor David Axelrod professed:

I think President Obama is a committed, practicing non-ideologue. He's consumed by neither tactics nor ideology. He is more concerned about outcomes than he is about process and categorizations. (Harris et. al, 2009: np)

While Obama's true personal ideologies (or lack thereof) can never be known, some theorists claim that political discourse itself is inherently ideological (Codd 1988, Smith 2004, Taylor 1997). Assuming this to be true, I use textual analysis in an attempt to uncover the ideologies present in the competing discourses of Obama's vision for education reform.

Research Question

Several related questions motivate this research. What discourses are present in Obama's vision for education policy? Which discourses are privileged and which are marginalized? What ideologies does this order of discourse (Fairclough 2001a) reflect? Finally, how and to what extent do the discourses and related ideologies in the analyzed texts affect public education practice in the United States?

Purpose of the Study

Education researcher Wayne Au (2009a: 310) studied Obama's education rhetoric and concluded that 'he fails to offer significant reform to education policy'. He further argues that Obama uses policy concepts and ideas 'in a context where the conservative Right has been defining these concepts in hegemonic ways and then using them to attack public education and equity minded reforms for many years' (Au, 2009a: 312). In the current study, I build upon Au's study and attempt to find out whether and to what extent Obama's discourse has changed over the past two years.

Overview of Methodology

Teun van Dijk (1986: 4) writes that critical science 'starts from prevailing social problems, and thereby chooses the perspective of those who suffer most, and critically analyses those in power, those who are responsible, and those who have the means and the opportunity to solve such problems'. For my study, the prevailing social problem is the federal government's significant role in shaping public K-12 education. Those with the potential to suffer most if the federal government failed to provide quality education policy and funding would be school-age children, in addition to parents, teachers and arguably the United States as a whole. Whether and how the federal government should provide for public education are both political topics in the broad and narrow senses and should be open for public debate.

I begin with a review of literature drawing from several fields. In the literature review I identify several conceptual tools that allow for a thorough, situated analysis. To bring these tools together in a coherent framework, I construct a model that demonstrates the connection between various strands of research in critical discourse analysis, critical education policy analysis and education philosophy. Within this framework, I critically analyze three texts in order to find linguistic evidence for the competing discourses in Obama's vision for education: Obama's 2011 State of the Union address (SOTU), the Department of Education's Blueprint for Reform policy proposal, and the Department of Education's Executive Summary of the Race to the Top (RTT) competitive grant program. The discourses found in each text and the relationships between them constitute the order of discourse, or the relative prominence and power each competing discourse has within the text (Fairclough, 2003). I then compare the order of discourse of each document to the others, and in doing so identify consistencies that make up the overall order of discourse for the three texts. I situate this order of discourse within a context of critical education policy research and educational philosophy, using the model I constructed showing the relationship between the following concepts: the goals of education, political ideologies, discourses found in education policy documents, the policies themselves and how these policies affect practice (Au, 2009b; Bernstein, 1996; Labaree, 1997; Taylor, 2004). After analyzing the texts and context, I make claims regarding Obama's ideological stance towards public education and suggest that it is not unproblematic.

Standpoint of the Researcher

Several researchers have chastised critical discourse analysis (CDA) for not upholding the scientific ideal of disinterested investigation by being too ideological (Chilton 2005). Advocates respond that CDA and other critical studies constitute a form of hybrid research/activism that uses established methods to analyze social practice while at the same time taking a normative

political stance (Luke, 2002; Chouliariki and Fairclough, 1999). Education has many competing purposes, but I argue that the limited purposes promoted in the following texts do not fairly represent the full potential for public education. I do not attempt to make a distinction between Obama's personal vision for education and the political action of passing a federal budget for education, because the end result is the same. Many people, including myself, have found these results to be insufficient.

CHAPTER 2 LITERATURE REVIEW

Section Overview

In the following literature review, I survey the theoretical landscape of critical studies as well as the historical context of education policy in order to situate the findings of the discourse analysis. I first discuss the relationship between ideology, discourse and the fields of critical discourse analysis and critical education policy analysis. I then move to educational theory and describe a mechanism of policy control called the pedagogic device as well as a philosophical framework of goals for public education policy. Following this, I review the effects on education policy of the historical discourse of managerial efficiency and the political discourse of neoliberalism. In an attempt to link all of the discussed theory and context in a coherent framework, I construct a model showing the interconnected nature of political, economic and social theory with education history and practice. Finally, I review several applications of critical theory to education research.

Ideology, Discourse and Critical Theories

Ideology and discourse

Van Dijk (2007) describes a theoretical basis for the concept of ideology that is rooted in both discourse analysis and cognitive science. He proposes that an ideology is a relatively stable system of beliefs that is shared among a group of social actors. Ideology provides a structure for the production of discourse and other social practices by a group's members. It is non-deterministic: not all discourses produced by a social actor are necessarily representative of an ideology that they believe in. Van Dijk uses a cognitive model as one of the mechanisms through which ideology shapes thought and behavior, but also recognizes that sometimes ideology may influence discourse without the intermediary of cognitive processes. For my study, I refer to

political and social philosophies as ideologies. Members of the ideology of democracy for example, emphasize the organization of society around everyone being able to voice their opinion, while members of the ideology of meritocracy promote a society in which people are judged upon their achievement and not their inherent class. Van Dijk's cognitive model provides the mechanism through which beliefs about how society should be organized translate into the production of discourse.

Moving to a theory of discourse, Van Dijk delineates the construct of knowledge from the construct of discourse. He defines knowledge as the beliefs and values that are presupposed in a community, while discourse are beliefs and values that are not presupposed and open to dialogue. Knowledge, in this sense, falls within Gramsci's concept of hegemony, or hegemonic discourse. Gramsci argues that the beliefs and values that are presupposed in a community necessarily promote and maintain the current structure of power and dominance (Burke, 1999). This occurs because those in power rely on hegemonic beliefs about the organization of society in order to remain in a position of power. Hegemonic knowledge is difficult to contest, due to its normalized status as the nature of society. For Van Dijk, the process of turning hegemonic knowledge into discourse that is open to dialogue opens assumed social norms to critical debate in an effort to see whom they truly benefit. This is the first step in the process of reshaping society. Gee (1996) describes the difference between the uncountable noun discourse at the grammatical level from multiple, discrete Discourses at the social level. These individual Discourses represent alternative perspectives on how relationships between social actors and social goods should be constructed. Gee's Discourses are closely related to ideologies, but refer to ways of representing social action rather than just beliefs about social action. Individual Discourses can exist in dialogue with each other and be used to contest hegemonic knowledge by

recontextualizing it as one possible Discourse. Luke (2002), on the other hand, points out that in the post-modern world discourse can be difficult to categorize. Following Foucault, Luke cautions:

Not to privilege or presuppose structure, not to suppose coherence, intention, systematicity. Discourse might be acting arbitrarily, randomly, and idiosyncratically for ... it tends to take on a life of its own, autonomous from its historical authors, conditions of production, and so forth. Discourses exist and are reproduced with the help of social actors, but they are not bound to any one person or text. (2002: 104)

For my study, I use the construct of discourses to refer to thematically related text elements that represent particular social actions in a particular way, such as the manner in which neoliberal discourse represents social actions as occurring in a market and a managerial discourse represents social actions in terms of bureaucracy and efficiency. The uncountable noun discourse, however, refers to any set of textual production.

History of Critical Discourse Analysis

The field of critical discourse analysis (CDA) developed from a desire to uncover power and dominance relations in discourse (Wodak, 2001). Starting in the 1920s, the Frankfurt school of social inquiry began to approach human behavior as situated cultural practice. By questioning hegemonic assumptions in social science, they recontextualized what had been the assumed knowledge of how society worked as one possible discourse, and in doing so opened it to debate and criticism from alternative discourses. The scholarship utilizing this new theoretical lens developed into critical theory. Affecting diverse fields of study from sociology to literature, critical theory views culture in a dialogic relationship with society. Culture shapes society at the same time that society shapes and changes culture. Due to the malleable nature of culture, it is a site of struggle between those who have control, those who wish to control and those who are controlled (Fairclough, 2001a). Theorists such as Michel Foucault and Herbert Marcuse applied

critical theory to Marxist class consciousness in an effort to counter the cultural production of oppressive regimes in mid-20th century Europe (Locke, 2004).

Working in the tradition of critical theory, Jürgen Habermas wrote about the concept of the public sphere, in which all social actors should be able to engage in a dialogue of competing discourses in an effort to influence the evolution of culture and society. Without equal power and opportunity to voice their opinions, certain actors would potentially be silenced and cultural hegemony would continue in the collapse of the public sphere. In the public sphere, Habermas argues that language serves ‘as a medium of domination and social force. It serves to legitimize relations of organized power. In so far as the legitimations of power relations . . . are not articulated . . . language is also ideological’ (Wodak 2001: 2).

Building off of Habermas’ observations, a group of European linguists proposed applying critical theory to the subfield of linguistics called discourse analysis in order to understand the textual representation of power inherent in many social problems. This group, working in the tradition of CDA, views text and context as existing in a similar dialogic relationship as culture and society. Text, they argue, has the potential to change context, while context influences and restricts what can happen in text. Each of the original linguists credited with founding CDA, as well as researchers from other fields, have developed unique approaches that emphasize and draw from different traditions in social science. In this sense, CDA is not a structured analysis or methodology but rather an approach to discourse analysis that seeks to use the dialogic nature of language to reshape society and identify and redefine power relationships.

Theory and Method in Critical Discourse Analysis

Meyer (2001) characterizes CDA as a reflexive process in which theory and data mutually influence each other. If the researcher starts with the discourse itself, as often happens, they would then interpret the text, examine their assumptions and use that examination to add to

existing theory or justify the creation of new theory. Working within the chosen theoretical framework, the researcher then selects concepts, assumptions and models and operationalizes them into tools as is appropriate for the data. The tools are then reapplied to the data with potentially different results. If the results are consistently the same then the data can be said to have validity, at least within the chosen theoretical framework.

The various approaches to CDA differ at each stage of this process, drawing from diverse theoretical backgrounds and using multiple sets of tools to analyze discourse. Instead of rigidly adopting one framework, Wodak (2001) advises researchers to use a variety of conceptual tools guided by what is appropriate to the specific social problem at hand. Fairclough (2001a, 2003) proposes perhaps the most linguistically focused iteration of CDA, arguing that the role of discourse in social practice cannot be assumed and that it must be derived from thorough textual analysis. Fairclough makes use of Halliday's Systemic Functional Linguistic (SFL) model of language as well as Bakhtin's concept of genre and intertextuality. SFL focuses on language's potential for meaning and dynamic connection with social practice, as opposed to formalist approaches that focus on rule based grammar generation (Fairclough, 2001a). Bakhtin (1986) defines a speech genre as the contextual configuration that produces a certain type of speech event, made up of obligatory elements and optional elements as well as a typical time, place, function and content. The concept of speech genres allows the comparison of similar texts to identify what might be different and why. This comparison explores intertextuality, or the dialogue between texts. Fairclough (2003) also places a great deal of importance on the micro-level of text, developing tools to analyze grammatical, semantic and lexical relations at the phrasal level. The macro-level analysis of genre and intertextuality as well as the micro-level analysis of text aid the researcher in discovering how genre chains of texts represent social

practices. Fairclough (2001a) defines the order of discourse as the pattern in which discourses are privileged or marginalized in a set of texts. Given the assumed dialogic relationship between text and context, the order of discourse in a text can serve as a window into the prevailing social order of the context as well as the context shaping the order of discourse in the text.

Luke (2002), Chilton (2005) and others question whether analyzing the order of discourse truly has the power to change the social order, and if so, what are the necessary conditions for doing so. Luke terms this the logocentric fallacy, which reifies the text and presupposes its local uptake. Chouliariki and Fairclough (1999) respond to this type of criticism by promoting transdisciplinarity, in which critical discourse analysts work with other social researchers and activists to transfer academic scholarship into social change. Luke, a CDA researcher himself, responds to his own criticisms by suggesting that CDA move beyond the limited analysis of dominant discourses and into the realm of promoting and legitimating marginalized discourses that promote social justice. To answer the question of local uptake of discourse, in a following section I identify other mechanisms through which discourse affects the local practice of education. I intend to demonstrate that Obama's education policy controls practice through the ways in which it mandates top-down structural changes, narrowly defines success and failure at all levels and links these definitions to the distribution of resources. I look to the field of critical education policy analysis for some of the conceptual tools to analyze how policy controls practice.

Critical Education Policy Analysis

Education researchers, primarily working in Australia, have looked to critical theory as well to move forward in the analysis of education policy. Critical education policy analysis has its own separate body of scholarship, in some ways beginning when Prunty (1985) wrote a short but important article defining a research plan for the field. Prunty argues that education policy

legitimizes the beliefs, attitudes and values of its authors and in doing so reinforces their power. If a policy is not contested, the dominant discourses represented in the policy have the potential to become hegemonic. Therefore, the goal of the critical education policy analyst is to ‘expose the sources of domination, repression, and exploitation that are entrenched in, and legitimated by, educational policy’ (Prunty, 1985: 136). Similar to Luke (2002) and Van Dijk (2007), Prunty (1985) cautions that the order of discourse in an education policy cannot necessarily be assumed to affect social practice and this must be demonstrated through the analysis of the mechanisms that translate policy into practice. Codd (1988) sets the stage for the connection between discourse analysis, policy and practice:

Because the state has a particular interest in promoting public discussion of educational policy, its agencies produce various policy documents which can be said to constitute the official discourse of the state (Codd 1985). Thus, policies produced by and for the state are obvious instances in which language serves a political purpose, constructing particular meanings and signs that work to mask social conflict and foster commitment to the notion of a universal public interest. In this way, policy documents produce real social effects through the production and maintenance of consent. These effects, however, remain unrecognized by traditional forms of policy analysis which are derived from an idealist view of language and enshrined within technical-empiricist view of policy-making. (237)

Taylor (2004) incorporates CDA into critical education policy analysis in order to unmask the social conflict and assumed consent within policy documents. CDA incorporates both the political stance of seeking social justice and equity as well as the tools for a systematic analysis of the ways policy documents structure power in the order of discourse. While other types of educational policy analysis can also yield beneficial results, CDA provides an approach grounded in the concept of language constructing and representing the power relations of involved social actors.

According to Luke (2002) and others, uncovering the order of discourse is only one part of the puzzle. Critical education policy analysis, then, contains at least two additional tasks: to

demonstrate how the policy discourse affects practice, and to provide ways of contesting the policy discourse by promoting alternative discourses. Bernstein's (1996) pedagogic device, which I discuss below, accomplishes the second task, providing the mechanisms through which education policy delimits and controls classroom discourse. The third task, however, is in many ways the most challenging. Policy activists, educational researchers and citizens alike must become aware of hegemonic discourse and alternative discourse and then actively work to promote those alternative discourses in the public sphere. Critical education policy analysis should, therefore, strive to be transdisciplinary and accessible in the same way Fairclough (2003) argues that CDA should be.

Education Theory and History

The Pedagogic Device

Bernstein (1996) describes the pedagogic device as one of the mechanisms through which policy interacts with practice. Following several decades of foundational work in education theory and philosophy, Bernstein points to the pedagogic device as the mechanism through which those with power over schooling are able to control pedagogy and curriculum and therefore the order of discourse in the classroom. The pedagogic device consists of three nested sets of rules: the distributive rules which dictate who can take part in education and the curriculum they can use, the recontextualization rules which transform all other discourses and content into curriculum, and the evaluative rules which define the acceptable standards of performance and knowledge in a classroom (Bernstein, 1996). Distributive rules set the limits of acceptable discourse by controlling who teaches and what they teach. Any thought outside those limits is hypothesized to be unknowable, or at least unspeakable within formal schooling. Recontextualization rules operate at the level of textbook and curriculum development by appropriating discourses that exist independently of education, for example history or science,

and modifying them for the classroom. For fields in which multiple discourses compete for dominance such as in history, the process of recontextualization privileges certain discourses and marginalizes others. The evaluative rules continue this effect on the level of the individual student through testing and assessment by legitimating certain knowledge as valuable and other knowledge as meaningless. Education policy has the potential to control all of these rules to varying degrees.

Control of the Pedagogic Device Through Standardized Testing

One example of the way researchers argue that educational policy controls the pedagogic device is through high-stakes standardized testing. A high-stakes standardized test is a norm-referenced test given across a certain student population, often at the federal, state or district level. High-stakes means that the results of the test are linked to important outcomes, such as passing a grade, teacher pay or school funding (Au, 2009b). Proponents argue that standardized testing is both meritocratic and democratic in that it gives everyone an equal opportunity at success and advancement. Citing research linking achievement on standardized tests with socioeconomic status, Au responds with the claim that ‘systems of high-stakes, standardized testing are unequal by design in that they inherently (re)produce [sic] inequalities associated with socioeconomic relations external to education through the selective regulation and distribution of consciousness and identities’ (136, emphasis in original). Au further describes how standardized tests operate at the level of evaluative rules by rewarding institutionally defined knowledge and devaluing all other knowledge. Darder (2005) similarly proposes that the limited knowledge reified by standardized tests marginalizes the discourses of democratic values, children’s development, cultural difference and class privilege.

Disregarding the empirical question of whether high-stakes standardized tests are effective measures of knowledge, the fact that communities and students do not have any input as to what

knowledge is tested makes them inherently undemocratic. High-stakes standardized tests are often the final evaluation point that determines the future individual success of students as well as the distribution of funds to schools and teachers, therefore the knowledge deemed valuable by the test writers dictates curriculum and pedagogy at all other levels. In this way, education policy that includes high-stakes standardized testing gives test writers and policy makers the ability to control classroom learning and to some extent the consciousness of students through the pedagogic device. Taking Gramsci's view that hegemonic discourse must serve the existing social order, this pedagogic control may in effect reproduce existing social stratification under the guise of meritocratic opportunity for all.

Overview of the Philosophical Goals of Education

In addition to the conceptual and analytical tools of CDA, Wodak (2001) is correct in pointing out the need for historical context and social theory as well. Wodak criticizes the search for one true social theory and instead advocates the use, within reason, of the social theory that provides the best tools for understanding a particular social problem. The philosophy of education constitutes one broad subset of social theory. Scholars from Plato to Locke and more recently Dewey and Freire have wrestled with questions surrounding the purpose and design of education. Labaree (1997) provides one framework for understanding how these questions influence education policy discourse. He argues that with regards to designing and maintaining a public education system:

Goal setting is a political, and not a technical problem. It is resolved through a process of making choices and not through a process of scientific investigation. The answer lies in values (what kind of schools do we want) and interests (who supports which educational values) rather than apolitical logic. (40)

Labaree organizes the possible purposes of public education into three goals that are both historically and currently in tension with each other. The three goals are democratic equality,

social efficiency, and social mobility. Below, I recount Labaree's (1997) description of each goal and highlight the commonly associated discourses in order to identify their presence in the analyzed texts.

The goal of democratic equality envisions public schooling as an institution that prepares all students for the responsibilities of citizenship, to be capable of engaging in political discourse in order to shape the future of society and social institutions. Horace Mann, one of the founders of common schooling in the 19th century, believed that morality- and citizenship-based inquiry in schools could preserve public interest in maintaining a robust democracy while counteracting the growing private self-interest he saw resulting from the burgeoning capitalist economy. To fully participate in a diverse public sphere within the goal of democratic equality, students need equal access to a wide-ranging liberal arts education regardless of their social or economic status. Only then can all social actors engage in public dialogue and understanding with the common goal of creating an equal and just society. Thus, the discourses of equal access, social justice, citizenship, democracy and liberal arts promote the overarching goal of democratic equality.

The goal of social efficiency envisions education as serving national economic growth. Schools adapt students to a pre-existing, stratified job market in order to increase productivity throughout the national economy. The justification for this goal comes from human capital theory, which conceives of social actors as competing for limited resources in a public market. Social actors with more skills and knowledge have more human capital and are thus able to be more productive in the economy. Within the goal of social efficiency, public education is a conditional investment in the human capital of students, with the expected return being increased national productivity and economic growth. Education and its social benefits must be unequally distributed, however, in order to avoid an over-skilled workforce. Tracking and vocational

schools ensure that students are trained to work in every sector, even though these sectors do not provide equal compensation or social status. Curriculum and pedagogy must directly relate to future employment and productivity. Further, expenditures that do not contribute to subsequent increases in national productivity are seen as inefficient and unnecessary. This goal is often cited in fiscally conservative political rhetoric due to the fact that a majority of voters and taxpayers in any one election do not have school-age children. These voters identify more with the benefits of economic growth and lower expenditures than with the intangible benefits of democratic citizenship and comprehensive learning. The discourses of managerial and financial efficiency, job-centered curriculum, inherent economic inequality and national economic growth make up the order of discourse of social efficiency.

The goal of social mobility accepts the economic stratification of society but rejects a pre-existing social hierarchy. Students are seen as consumers who gain social status through competitive performance and prestigious credentials. Instead of the public investing in human capital for national economic benefit, individuals invest in their own human capital for private gain. Knowledge is only important in that its accumulation has an exchange value that translates into standard of living, financial security, social power and cultural prestige. Social actors compete for limited credentials and competitive job placement. Learning loses its intrinsic value and instead becomes an instrument to gain material wealth and social status. Curriculum and pedagogy only matter as much as they create a system of competition that differentiates success from failure. Students whose performance falls within the definition of success are rewarded with prestigious degrees and economic opportunities while students defined as failures are punished with undesirable jobs and low socioeconomic status. Within the goal of social mobility, because education is essentially a private good to be consumed through competition capitalist

theory asserts that schooling should be subject to market forces and private control. The order of discourse of social mobility includes the discourses of competition, consumerism, privatization, market forces and ultimately the discourse of neoliberalism, which I discuss in a separate section.

Both Codd (1988) and Labaree (1997) find the goal of social mobility to be dominant in current education philosophy. Labaree writes:

This approach to establishing a fair structure for educational competition takes a meritocratic form in large part because of the dominant place that meritocratic ideology occupies in American life. It is an ideology that captures in idealized form the entrepreneurial traits and values rewarded by a capitalist economy and projects them onto social life in general: the capacity and desire to struggle for advantage in a fiercely competitive social hierarchy, where success or failure is determined solely by individual merit. (56)

The ideology of meritocracy assumes that individual merit exists as an apolitical entity. Critical theory problematizes this concept, provoking the questions of who judges individual merit as well as how it is measured. The three goals Labaree describes define individual merit, success, and failure in different ways. For the goal of democratic equality, a successful student can actively draw on a well-rounded education to successfully participate in a democratic society in pursuit of social justice and equity. A student that successfully promotes social efficiency accepts their place within the social hierarchy and learns specific job skills to transition seamlessly into the national economy. The goal of social mobility defines a successful student as one who acts in their own rational self-interest by gaining an advantage over other students while rising to the top of the hierarchy due to their competitive drive and natural talent. Most of the discourses that compete in education policy deliberations can be traced back to these three goals. In the next section I look at the historical factors that have privileged some of these discourses and marginalized others.

Managerial Discourse and Corporate Influence in U.S. Education History

Labaree (1997) contends that the competition between the three goals he describes underpins the history and current discourse of education policy in the United States. On the other hand, Au (2009b) gives prominence to the historical context in which the discourse of managerial efficiency has shaped education policy since the late 19th century. The discourse began with Frederick Taylor, who helped create and implement the factory model of mass production in manufacturing in the U.S. Taylor emphasized the importance of collecting scientific data that could be used to manage large numbers of workers in an effort to achieve peak efficiency. In response to the influx of massive amounts of students into public education at the start of the 20th century, John Franklin Bobbitt proposed applying Taylor's factory model to schools in order to gain efficiency and control over educational objectives. Proponents of industrializing schools reified strict standards and quantitative assessments. They argued that the application of scientific principles to education theory rendered the design of curriculum and pedagogy an apolitical, technical matter to be determined with respect to data-based outcomes. In addition to the issue of dealing with a rapidly increasing school population, Au (2009b) describes three additional reasons that the factory model received such rapid implementation:

- It allowed students to be indoctrinated as docile workers more effectively in a time of labor unrest;
- Educational policy was strongly influenced by a displaced class of engineers who wanted to solve social problems with industrial techniques;
- Decentralized school boards at the time were made up mostly of professional men who subscribed to the dominant ideology of technological rationalism. (27-30)

More recently, Au notes a rise in the explicit relationship between corporations and education policy, both symbolically and financially. Au hypothesizes that the modern iteration of the engineer class is the corporate mid-level manager class. Instead of taking cues from industrial

engineering, this new class of professionals combines managerial techniques from business (social efficiency) with the market competition discourse of neoliberalism (social mobility) to redesign public education.

Barkan (2010) conducted a study on corporate influence in current education policy debate and discovered that private foundations were one of the main sources of managerial discourse and policies. She found that three private foundations: the Bill and Melinda Gates Foundation, the Walton Family Foundation, and the Broad Foundation have donated billions of dollars to fund specific education reforms. These foundations run in part on profits from Microsoft, Wal-Mart, and the sale of SunAmerica to AIG respectively. Barkan convincingly demonstrates how the policy desires of these three foundations have come to represent the standing policy of the Department of Education, as well as how Gates himself was directly influential in the implementation of Race to the Top and the appointment of Secretary of Education Arne Duncan. The dominant influence of these private foundations leads to a lack of public dialogue surrounding education reform. This is problematic as it reveals a partial collapse of the public sphere. Barkan further highlights the Department of Education's top-down approach by describing the short time window it gave for public response following the initial publication of the Race to the Top Summary. The Board on Testing and Assessment (Board on Testing and Assessment, 2009), in partnership with the National Research Council, attempted to quickly review the program before the deadline for public comments. Collectively, they penned a report that criticized Race to the Top's reliance on the high-stakes National Assessment of Educational Progress exam and policies that reward or punish teachers based on their students' test scores. However, the Board on Testing and Assessment was unable to finish the report fast enough and its widely respected criticisms went unheeded.

The Gates Foundation also advocates for what are known as school turnaround policies. The solution to bad schools, Gates argues, is to shut them down and distribute the students among better performing schools. The independent research group Communities for Excellent Public Schools (Communities for Excellent Public Schools, 2010) reported that school turnaround policies disproportionately targeted schools with high concentrations of poverty and Black and Hispanic minorities. In the report, they argue that the policies marginalize local discourse because they are imposed on communities rather than developed with communities. In addition, the turnaround policies target structural rather than educational change. Instead of supporting the discourse of social justice, the policies take the managerial approach to social efficiency: if a school isn't working then fire the staff or shut it down. Further criticizing Gates, Barkan (2010) cites data showing that school turnaround policies are ineffective and actually produce significant community disruption with little benefit.

The policies put forth by the three influential foundations described by Barkan (2010) align with five common education policies that, according to Ball (1998) have taken root in post-modern countries around the world:

- Strengthening the connection between education, employment, productivity and trade.
- Enhancing student outcomes in employment-related skills.
- Gaining control over curriculum and assessment.
- Reducing costs to government and to business.
- Creating more opportunities for direct involvement by consumers and the market in the form of school choice and vouchers. (122)

Ball notes that during periods of global economic adversity, the marketization of education and the raising of standards to increase international competitiveness prove to be politically popular justifications for policy change. While he admits that 'It would be ridiculous [sic] to claim that

there is one or even one set of key ideas or influences which underpin this package [of policies]', he nonetheless attempts to identify the major forces behind this discourse of reform (122). One of these forces, neoliberalism and its concomitant discourses of competition and market forces, has been identified as the primary agent of change in education policy and post-modern society in general by social science and education researchers alike (Au, 2009b; Ayers, 2005; Bourdieu, 1998; Fairclough, 2001a; Harvey, 2005; Saunders, 2010).

Neoliberalism: Ideology or Discourse?

Much of the work in CDA and critical education policy analysis has linked distressing trends in social inequality with the rise of neoliberalism. While Labaree (1997) offers one nuanced approach to understanding the competing discourses in education policy, the scholarship on neoliberalism cannot be ignored. Education policy is intertwined with the national economy, and neoliberalism has dominated economic theory for several decades. Immediately following the Second World War, a group of economists led by Friedrich Hayek and Milton Friedman sought to reorganize the principles of capitalism. Up until that point, capitalism in the U.S. existed as embedded liberalism in which strong regulation and state intervention kept markets in check (Harvey, 2005). They proposed a mix of Adam Smith's neo-classical economics and market liberalism, which in its ideal form works roughly as follows. Every individual is viewed as an autonomous rational actor with unlimited personal freedom. The state guarantees national security and limited social services so that individuals can be free to compete for economic resources in an unregulated market (Munck, 2005). If everyone (who is willing to and can work) acts in their own best interest then the market self-regulates and produces the maximum benefit for all. Economists argue that neoliberalism takes advantage of Hobbesian self-interest to solve social problems as well as economic ones. Personal wellbeing becomes a market commodity (Ayers, 2005).

Neoliberalism did not catch on immediately. From the New Deal until Reagan took office, Keynesian embedded liberalism reigned, delivering a strong welfare state and heavy regulation to curb market inflation. However, in response to the economic downturn of stagflation in the 1970s, Reagan in the U.S. and Thatcher in the U.K. began to implement a revised version of neoliberalism, dubbed the Washington consensus (Munck, 2005). In contrast to the utopian idealism of Hayek's theory, Reagan and Thatcher's application of neoliberal policies did more to promote the growth of large financial institutions and personal wealth for a small group of nouveau riche than solve social problems (Duménil and Lévy, 2005). The period of neoliberal hegemony from the late 1970s until the present has seen a marked increase in economic stratification in the United States and around the world (Harvey, 2005). Neoliberalism purports to uphold personal freedom as the dominant value, but Harvey (2005) relates Karl Polanyi's criticism of this bad faith pronouncement. Polanyi described two kinds of opposing but interrelated freedoms. The politically popular version of freedom is the freedom of conscience, freedom of speech, of meeting, of association and the freedom to choose one's employment among other things. The other kind of freedom is the freedom to exploit other people, the freedom to make enormous profits without benefitting the community, the freedom to privately control the use of helpful technology and the freedom to profit from disasters. In practice, many of the current proponents of neoliberalism do not distinguish between these two types of individual freedom:

The idea of freedom 'thus degenerates into a mere advocacy of free enterprise', which means, 'the fullness of freedom for those whose income, leisure and security need no enhancing, and a mere pittance of liberty for the people, who may in vain attempt to make use of their democratic rights to gain shelter from the power of the owners of property. (Polanyi, 1944 as quoted in Harvey, 2005: 37)

This conflation of freedoms happens when liberal, meritocratic ideologies inform public policy in the context of a de facto plutocracy. On the surface, everyone has an equal opportunity to

succeed. In reality, a small elite control economic and political power and are loath to give it up (Duménil and Lévy, 2005). Neoliberalism does not constitute an ideology, but rather a discourse of policy that ‘serves to propagate the American Dream of individual opportunity and meritocracy while denying the very real structural inequalities that are increasingly being imposed on more and more people in this country and around the world’ (Au, 2009b: 61).

Tying Together Educational Philosophy and History

How does education policy fit into this economic and political context? According to Labaree (1997), the discourse of education policy in the United States revolves around trying to balance the three goals of democratic equality, social efficiency, and social mobility. These goals also implicate economic and social ideologies, which in turn are expressed through competing discourses and influence policymaking. Based on the theoretical and applied research I previously discussed, I propose the following model to show the relationship between these constructs (Figure 2-1).

The goal of democratic equality relates to the ideology of socialism, in which everyone deserves an equal share, as well as the ideology of democracy, in which everyone deserves an equal voice. The ideologies of conservatism and plutocracy, essentially keeping the status quo of social stratification for stable economic growth, inform the goal of social efficiency. In turn, social mobility promotes the ideologies of liberalism, that society should maximize individual freedom, and meritocracy, which prioritizes rewarding individuals based on their talent and effort. The discourse of neoliberalism occurs at the nexus of plutocracy and liberalism, connecting to both the goals of social efficiency and social mobility. With neoliberalism being the dominant hegemony socially and economically, and educational policy deriving historically from the discourse of managerial efficiency, I predict that the goal of democratic equality and the concomitant discourses of social justice, equality, liberal arts and citizenship will likely be

marginalized in the currently analyzed education policy (Au, 2009b; Harvey, 2005). Harvey suggests that:

[The] values of individual freedom and social justice are not ... necessarily compatible. Pursuit of social justice presupposes social solidarities and a willingness to submerge individual wants, needs and desires in the cause of some more general struggle for, say, social equality or environmental justice. (Harvey, 2005: 41)

The educational goal of social efficiency is compatible with the educational goal of social mobility, insomuch as it trains students to be productive in a stable, yet stratified economy that supports individual financial gain. Obama's educational philosophy and policy exist within this socioeconomic milieu. For my research, I hypothesize that the goals for public education of democratic equality, social efficiency, and social mobility are comprised of a field of competing discourses that draw from the ideologies of democracy and social justice, plutocracy and conservatism and meritocracy and liberalism.

Previous Studies Using Critical Discourse Analysis in Education Research

Researchers have successfully used critical discourse analysis (CDA) and related critical inquiry to document and contest many aspects of education discourse and policy. I found that many studies focus on post-secondary education. This may be due to the close relationship of academic researchers to universities or the fact that the increased autonomy of public universities has left them open to market forces in a more direct way than primary or secondary schools. Ayers (2005: 538) found that neoliberal discourse in community college publicity and mission statements reduced learners to economic entities whose responsibility to society is to 'please employers' so that business and industry may remain competitive in the global economy. Further, he found that colleges restructured their curricula to better accommodate the demands of business and industry, marginalizing the discourses of 'moral and ethical responsibilities to family, community and democratic society' (Ayers, 2005: 540).

Saunders (2010) documents a shift in public universities towards the explicit corporatization of higher education. Saunders agrees with Au (2009b) that the discourse of business and market principles began to influence education policy as early as the 19th century and cautions against subscribing to an idealistic history of universities serving civic duties. Saunders hypothesizes that due to lower public funding, public universities now compete at a disadvantage in a deregulated market of private institutions funded by exorbitant tuitions and slick technical schools that provide little more than credentials. This uncompetitive position forces the administration to shift funding to departments that produce revenue, such as engineering and business, and away from the arts and humanities. Labaree (1997) wrote about the post-secondary credential market in which the intrinsic value of learning is displaced by the extrinsic value of educational achievement for economic gain. Saunders' findings that students are increasingly focused on personal advancement and financial success corroborate the preeminence of this market. In 1966, 80% of students in one study responded that they wanted to develop a life philosophy in college while only 45% cited financial success as a motivation. The results in a similar study in 1996 were almost the opposite, 42% versus 74%. This may, however, be due in part to an increase in the number of students attending college from a background of low socioeconomic status. Self-actualization might not be a top priority for someone who has never had financial stability.

In a volume titled *An Introduction to Critical Discourse Analysis in Education*, Woodside-Jiron (2004) deftly combines Bernstein's (1996) pedagogic device and Fairclough's (2001) CDA to understand how a small group of professionals in California crafted a consensus around reading policy in K-12 education. She found that new, undebated policies and texts were intertextually linked to established texts in order to presuppose audience acceptance.

Policymakers referenced an assumed set of fundamental skills for reading and implemented them in state policy without providing legitimate theoretical or research justification. Woodside-Jiron argues that a few policymakers essentially appropriated the pedagogic device to privilege a managerial discourse of discrete skills. Through the analysis of the development and instantiation of one policy, Woodside-Jiron traces the chain of power as it is enacted through policy and eventually practice.

Cochran-Smith and Fries (2001) use CDA to analyze the competing discourses in the debate over deregulation of teacher education. They find that both sides of the debate employ similar discursive strategies to promote their point of view and discredit the other's. They dub these strategies warrants in that they refer to justification or reasonable grounds to make a claim. The three warrants they identify are the evidentiary warrant, the political warrant, and the accountability warrant. The evidentiary warrant points to the support of research to render its claim neutral and apolitical, while the corollary attack strategy claims the opponent's position to be ideological and not grounded in fact. The accountability warrant mirrors the managerial discourse of education policy based on quantifiable outcomes and results as opposed to theories and inputs. The political warrant promotes the values and ideologies of one perspective while marginalizing the values and ideologies of the other. Assessing the use of these warrants by either side, they conclude that the proponents of deregulation rely more on attacking strategies rather than substantial claims. This rhetoric has proven to be effective, as policymakers have increasingly pushed for deregulation of teacher education.

Conclusion of Literature Review

In this section I reviewed the philosophical, economic and historical context that shape the landscape for current education policy debate. I constructed a model that tied together the relationship between philosophical goals for education, political and economic ideologies,

competing discourses, common education policies and the mechanism through which these policies affect practice in schools and districts. I discussed the significant influence that two of the discourses, managerial efficiency and neoliberalism, have had in the development of schools and education policy. Following this contextualization, I surveyed several applications of CDA to education discourse to situate my thesis within current research.

Obama and his Department of Education occupy a powerful position in the education policy debate. As Codd (1988) wrote, government policy constitutes the official discourse of the state. The state, in turn, controls billions of tax dollars used to fund public education. To track, therefore, the effect of this federal money requires a thorough understanding of the discourse of Obama's vision for education. As previously mentioned, Au (2009a) reviewed Obama's statements and policy proposals regarding education during his campaign and the beginning of his presidency. Au found a confusing mix of neoliberal and democratic rhetoric but was unable to discern a clear vision for change. Obama criticizes the educational legacy of his predecessor, George W. Bush and *No Child Left Behind*, but Au points out that Obama publicly targets the most unpopular policies but is silent on many other controversial ones, such as a reliance on high-stakes standardized testing and teacher performance pay. Au expresses guarded hope that Obama is actually maneuvering politically to pass other more substantial progressive legislation with bipartisan support, but does not put much faith in this viewpoint. In this thesis I examine Obama's education discourse since 2009 in an attempt to discover whether Au's (2009a) hope for significant change has been realized:

The key issue will revolve around two sides of the same accountability coin: how will achievement be measured, and how will failure be defined? But, in answering this question, can Obama give up the tests, the businesslike accountability, and the commitment to school choice, competition, human capital, and merit pay? (p.317)

The answer to the above questions, I believe, is found within the answers to the proposed research questions regarding the order of discourse in Obama’s education vision and policies. In the next section I operationalize the tools used to uncover the order of discourse.

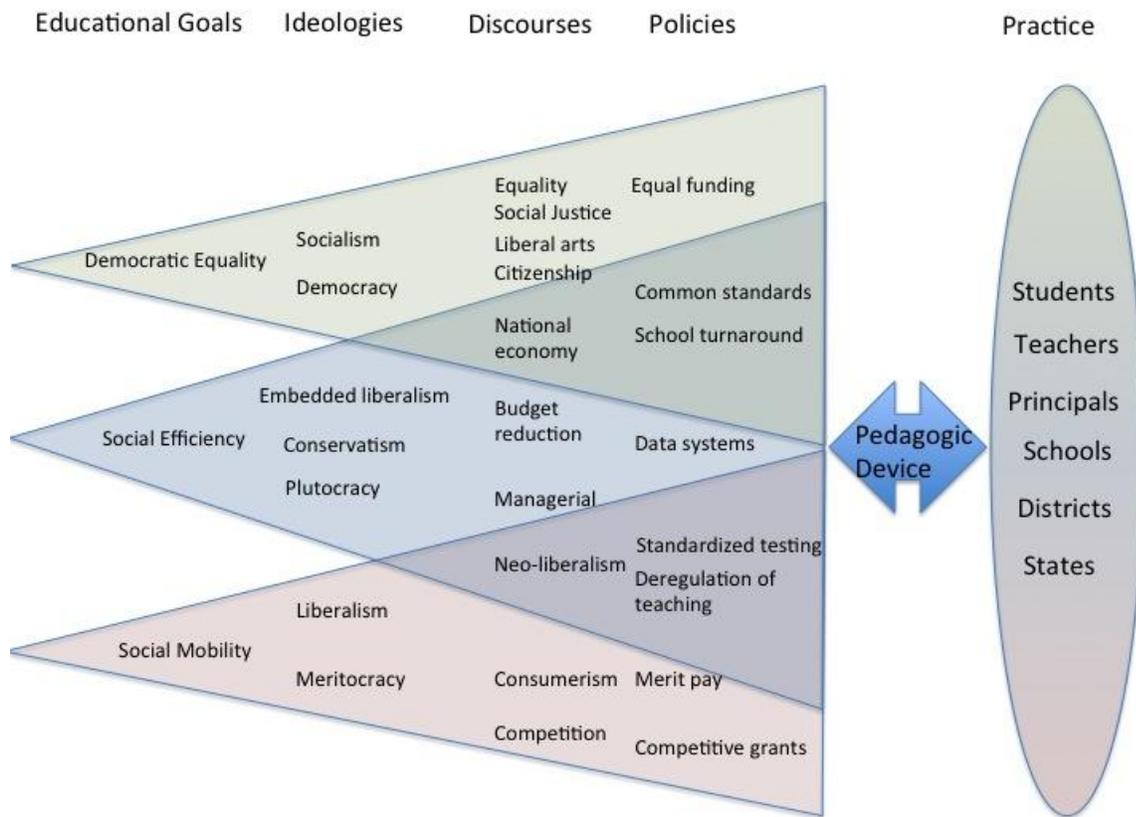


Figure 2-1. Original model connecting work done by researchers in several fields (Au, 2009b; Ball, 1998; Bernstein 1996; Labaree, 1997; Van Dijk, 2007)

CHAPTER 3 METHODOLOGY

Choice of Texts

The texts I chose to analyze to uncover the order of discourse of Obama's vision for education are:

- President Obama's 2011 televised State of the Union (SOTU) address (Office of the Press Secretary, 2011);
- The Department of Education's Blueprint for Reform (U.S. Department of Education, 2010);
- The Department of Education's Race to the Top (RTT) Executive Summary (U.S. Department of Education, 2009)

Sauer (1997) correctly points out that in the modern, media saturated political system, all texts released by a political party can be assumed to represent the party line. Each of the analyzed texts has numerous authors, but what links them is Obama's final political endorsement. At times I refer to authorship by Obama, Secretary of Education Arne Duncan, Obama's administration, the Department of Education and a number of other agents. All of these authors represent the administration in power, which in the bicameral political system is also the leadership of the Democratic party.

The SOTU was televised on January 25th, 2011 at 9 P.M. Eastern Standard time by public and private news television stations. The White House published a transcription of the address online at their website WhiteHouse.gov (Office of the Press Secretary, 2011). Keeping in mind Ochs (1979) notion of transcription as theory, I decided not to transcribe the speech myself; instead utilizing the White House's prose style transcription. It provides sufficient information for analyzing the semantic content of the speech. For analysis along rhetorical dimensions such as speech style and pragmatic emphasis a more in-depth transcription would prove useful, however it is not necessary for the paper's main arguments (Sauer, 1997; Van Dijk; 2001).

The Blueprint and the RTT Summary exist as downloadable documents on the Department of Education's website. The Blueprint is dated March 2010 and the RTT Summary is dated November 2009. Both documents are publicly available and are representative of the public's most immediate access to information about the programs. Whereas Race to the Top has been enacted as substantive policy, the Blueprint is a description of the policy changes desired by the administration in the current reauthorization of the Elementary and Secondary Education Act. The precise policies enacted in the current budget will need to be analyzed by policy experts after it is passed.

Tools

Fairclough's (2003) approach informs the intertextual and interdiscursive analysis of the present study. Following Wodak (2001) and Luke (2002), I do not rigidly analyze each text according to a set of criteria but rather attempt to apply the most relevant categories where needed. The application of Fairclough's approach to education policy is best exemplified in Taylor (2004) and Woodside-Jiron (2004). The interdiscursive analysis looks at the linguistic elements of each text and then attempts to connect what is found linguistically to what is known about the competing discourses present in the wider discourse of education policy. I reference thematically relevant samples from each text in an attempt to balance fair representation with a concise, coherent narrative. The intertextual analysis compares the three documents to find whether they present a unified order of discourse or if not, to find what is the nature of the discursive shift.

The data is categorized within the previously described model (Figure 2-1) that shows the connections between educational goals and ideologies, competing discourses, policies and how those policies affect actual classroom practice and discourse. I constructed the model to show that certain policies and discourses within the policies are necessarily related to economic

ideologies and philosophical goals for education. In a policy, when certain discourses are privileged and others marginalized, policymakers reveal the ways in which they believe education should serve society and the individual. These beliefs, represented in the model as goals of education, fit within certain ideologies about how the government should interact with economy and society. Consequently, the goals, ideologies, discourses and policies themselves shape the experience of school-age children, teachers, parents, administrators and legislators. My thesis explores data at the discursive level in order to make claims about the goals Obama has for federally funded education. The connection I make between certain goals, ideologies, discourses and policies is an a priori theoretical assumption while the order of discourse in Obama's education policy is based on empirical evidence from discourse analysis. Thus, while the policies Obama promotes for education may (or may not) indeed be effective, the results from this thesis identify the goals Obama has for public education in society.

CHAPTER 4 CRITICAL DISCOURSE ANALYSIS

In this section I use tools from Fairclough's (2003) critical discourse analysis (CDA) to analyze three documents representative of Obama's vision for education. I work through an interdiscursive of each document and then summarize the findings, which make up the order of discourse for the individual text. I then survey the findings from all three documents through intertextual analysis to describe the overall order of discourse of Obama's education policy.

State of the Union Address

The State of the Union address (Office of the Press Secretary, 2011) makes up part of a chain of social events in which the President of the United States proposes and promotes a set of policy initiatives that will be the administration's focus for the upcoming year. These policies may or may not come to fruition, but they represent a united front for the administration (Sauer, 1997). While the President is the social actor delivering the text, a head speechwriter attempts to incorporate the policy plans of all of the departments in the administration while constructing a coherent speech (Shapiro, 2011). Key talking points are given in advance to certain media outlets, which then distribute the points to the public in anticipation of the address (Bull, 2011). The White House carefully scripts the speech and immediately uploads a transcribed text to the official web site, WhiteHouse.gov (Office of the Press Secretary, 2011). A multitude of media outlets, including the White House itself, engage in instantaneous interpretation via blogging and social networking (Gaudin, 2011). Given the media hyper-attention and the multi-dimensional nature of authorship and interpretation, the SOTU can be construed as a hybrid of the political speech genre and the promotional genre (Sauer, 1997). Fairclough (2001a) describes the technologization of discourse in political text, in which authors utilize sociolinguistic and psycholinguistic training to carefully design texts in order to promote certain discourses and

justify policy decisions to the voting public. Rhetoric has always carried with it motivations of influence and persuasion, but the micro-linguistic preparation of speeches marks a new era in the level of sophistication with which texts are planned.

Interdiscursive Analysis

In the 2011 SOTU, Obama constructs a narrative of the United States as a nation in decline. One solution he proposes is education reform. A survey of the rhetorical context is necessary to situate the discourse of education within the larger order of discourse. All of the following extracts are from the 2011 State of the Union address (Office of the Press Secretary, 2011).

Extract 1

Many people watching tonight can probably remember a time when finding a good job meant showing up at a nearby factory or a business downtown. You didn't always need a degree, and your competition was pretty much limited to your neighbors. If you worked hard, chances are you'd have a job for life, with a decent paycheck and good benefits and the occasional promotion. Maybe you'd even have the pride of seeing your kids work at the same company. (Lines 67-72)

Obama creates a highly modalized history of the job market as it 'probably' applied to 'many people' at a certain 'time' in the past, although the history of marginalized populations that experienced a different employment context is not mentioned. He references an idealized story of industrialization before globalization. He describes it as a period during which 'competition was pretty much limited to your neighbors'. This positively frames an experience without global competition while implicitly framing globalization negatively. Then, he assumes a modalized if/then clause relationship that references the discourse of meritocracy. The necessary condition is hard work while the result is lifetime employment, financial gain and social mobility. In this extract, the United States used to be a place in which life was simple and hard work was rewarded, which constructs an implied difference from the current situation. Logically, the

current situation might be a world in which hard work is not rewarded. In the following extract Obama describes the world today, which is a much harsher world.

Extract 2

That world has changed. And for many, the change has been painful. I've seen it in the shuttered windows of once booming factories, and the vacant storefronts on once busy Main Streets. I've heard it in the frustrations of Americans who've seen their paychecks dwindle or their jobs disappear — proud men and women who feel like the rules have been changed in the middle of the game.

They're right. The rules have changed. In a single generation, revolutions in technology have transformed the way we live, work and do business. Steel mills that once needed 1,000 workers can now do the same work with 100. Today, just about any company can set up shop, hire workers, and sell their products wherever there's an Internet connection. (Lines 74-84)

Obama proclaims that the pre-globalization world of factory jobs for life and hard work being rewarded 'has changed'. Initially, change exists in the passive and does not have an agent, implying that it is the natural evolution of society. Obama juxtaposes the world pre-'change' and post-'change' with the following semantic pairs of sensory experiences he has seen or heard: booming/shuttered, once busy/vacant, proud/frustrations. The metaphor of 'rules' being 'changed in the middle of the game' conceives of pre-globalization competition as fair while the new, global competition is unfair. Obama identifies the first agent in bringing about this new, unfair competition as 'revolutions in technology'. He references a specific example of 'steel mills' needing less workers because of technology, but does not mention the human agents who chose to replace jobs with technologies in order to cut labor costs (Aronowitz, 2001). The second agent responsible for bringing about unfair competition is globalization, referred to as 'any company' that can do business 'wherever there's an Internet connection'. Again, the human agents that have moved labor overseas to cut costs are not mentioned. Businesses that 'set up shop' around the world are implicated before businesses that 'hire workers' around the world. Obama sets globalization up as the root problem: that life used to be fair at some point when

competition, and by extension life in general, ‘was pretty much limited to your neighbors’. In the next extract he offers the logical solution to any difficult competition, which is to beat all of the other competitors.

Extract 3

And now it’s our turn. We know what it takes to compete for the jobs and industries of our time. We need to out-innovate, out-educate, and out-build the rest of the world. (Applause.) We have to make America the best place on Earth to do business. We need to take responsibility for our deficit and reform our government. That’s how our people will prosper. That’s how we’ll win the future. (Applause.) And tonight, I’d like to talk about how we get there. (Lines 114-119, parentheses in original)

Obama utilizes the discourse of change and global competition while assuming a consensus for all of Congress, and by extension the voting public it represents. The use of the pronoun ‘we’ presupposes agreement with regards to: needing to compete and win globally, taking responsibility for the government and deficit, and knowing how to do so. Here, we see the consensus building ‘we’ referencing the Congress he is physically addressing, whereas at other times he uses ‘we’ to reference all of the United States. The neologisms ‘out-innovate’, ‘out-educate’, and ‘out-build’ and the phrase ‘win the future’ represent the world as a zero-sum global marketplace, necessitating a field of winners and losers and implying that all out competition is the only strategy and definition for success. This vocabulary fits into the discourse of neoliberalism, in which the world is a marketplace and success in ‘the future’ is a limited resource that not everyone can have. In this view, any self-interested rational actor, such as the United States, would attempt to accumulate as much of that resource as possible before other countries depleted it. Obama subscribes to this worldview, and in the following extract provides some of the key elements to ensuring that the U.S. is able to monopolize the resource of future success.

Extract 4

Maintaining our leadership in research and technology is crucial to America's success. But if we want to win the future — if we want innovation to produce jobs in America and not overseas — then we also have to win the race to educate our kids. (Lines 187-189)

Obama applies the theme of winning and competition directly to education. He uses two 'if' clauses with one 'then' clause: 'if we want to win the future' and 'if we want innovation to produce jobs in America and not overseas'. The use of 'then' presupposes a causal relationship between those two conditions and winning the 'race to educate our kids'. This dexterously assumes that such a race exists and that it is indeed winnable. It also assumes that 'innovation' is the agent responsible for producing jobs, as opposed to the more traditional job providers of private enterprise or government. The agency of innovation as job-producer is found throughout all three texts. The inclusion of 'not overseas' sets up a polarization of 'us', the United States, versus 'them', the rest of the world. In this dichotomy, 'innovation' is incapable of producing jobs both in America and overseas. It is not apparent whether the 'race to educate our kids' is a race in which all children around the world receive education. To justify the charge to win the education race, in the next extract Obama describes some ways that the U.S. is losing the race.

Extract 5

The quality of our math and science education lags behind many other nations. America has fallen to ninth in the proportion of young people with a college degree. And so the question is whether all of us — as citizens, and as parents — are willing to do what's necessary to give every child a chance to succeed. (Lines 193-197)

Obama makes a vague, unqualified assertion about 'math and science education' lagging behind 'many other nations', which creates a sense of unease and implies that the United States is losing the global race for education. By explicitly referring to these two dimensions of education, he implies that math and science are the only academic subjects that are important in winning this

race. 'The quality of our math and science education' is undefined here and indeed unquantifiable, which is problematic for the managerial discourse that reifies the value of data and outcomes. Internationally benchmarked standardized test scores are quantifiable, however, and Barkan (2010) argues that these scores are responsible for the rhetoric of the U.S. falling behind in math and science. Obama fills the need for indexical status with the next statistic about 'the proportion of young people with a college degree'. The question he asks at the end of the extract includes the discourse of social justice, 'give every child a chance to succeed'. Given the ways in which he has defined success so far, winning limited resources so that global competitors lose economic opportunities, the discourse fits more into the neoliberal paradigm than a discourse of equality for the world's population. In the following extract, Obama identifies failing schools as another way in which the U.S. is losing and therefore needs solutions.

Extract 6

When a child walks into a classroom, it should be a place of high expectations and high performance. But too many schools don't meet this test. That's why instead of just pouring money into a system that's not working, we launched a competition called Race to the Top. To all 50 states, we said, "If you show us the most innovative plans to improve teacher quality and student achievement, we'll show you the money." (Lines 206-211, quotations in original)

In this extract, Obama positions schools as failing and offers a solution: 'a competition called Race to the Top'. The assumption here is that schools don't have 'high performance' because they don't meet the test of having 'high expectations'. This implies that the solution of 'competition' will raise both expectations and performance. Obama juxtaposes the negative semantics of 'pouring money into a system that's not working' with the positive semantics of 'launch[ing] a competition' to give further credence to his proposal. He also references 'innovative plans' which he has previously designated as plans that promote zero-sum international competition in math and science. 'We'll show you the money' is the carrot

designed to influence ‘all 50 states’ to implement plans that fit the federal guidelines for ‘innovative’. The chosen pronouns ‘we’ and ‘you’ and the cultural semantics¹ related to the idiom ‘to show someone the money’ sets up a neoliberal power relationship in which states must compete in order to win a prize from the federal government. However, due to its nature as a competition, some states will win and others will lose. This contradicts Obama’s previous call to do ‘what’s necessary to give every child a chance to succeed’. In the last extract, he cites several ‘if’ clauses but then references a much different possible outcome than in the previous extracts.

Extract 7

If we take these steps — if we raise expectations for every child, and give them the best possible chance at an education, from the day they are born until the last job they take — we will reach the goal that I set two years ago: By the end of the decade, America will once again have the highest proportion of college graduates in the world. (Applause.) (Lines 264-268, parentheses in original)

Obama brings the segment on education to a close with a much less substantial claim than he implied earlier. He argues that if ‘we raise expectations’ and ‘give children the best possible chance at an education’, then this will lead to the result of having the highest proportion of college graduates in the world. The first assumption is that those two conditions will lead to that result, and the second assumption is that the goal of winning the global competition for proportion of college graduates is a worthy one. As previously mentioned, this goal is misplaced due to the fact that there may be fewer jobs requiring college degrees in the U.S. than people with college degrees (Aronowitz 2001). Obama pays service to the discourses of equal opportunity and the goal of democratic equality by mentioning ‘every child’, but semantically this refers only to children in the U.S. and explicitly not children in other countries.

¹ The phrase ‘show [recipient] the money’ was perhaps popularized in the 1996 movie Jerry Maguire in which it refers to an NFL player winning a lucrative contract. Several game shows in the U.S. and around the world have used the phrase as a namesake. (IMDB, 2011)

Discussion of the State of the Union Analysis

The speech overall privileges discourses of global and local competition, neoliberalism, national economic interests and innovation through math and science education while effectively marginalizing discourses of equal opportunity for education around the world, liberal arts education and democratic or social justice ends. Obama uses the strategy of presenting problems and then positioning the administration's policies as the solutions without offering much in the way of justification. He begins with the issue of economic insecurity and then presents one of the solutions as investment in education. The references to America's potential to 'win the future' with regards to education, employment and innovation fits within the goals of both social efficiency and social mobility, in the sense that the nation as a whole is benefitting by competing in a global race for prosperity. Obama does not refer to education explicitly as an investment, but rather a key to winning that global race. The implied return for training for that race is 'winning the future'. This metaphoric language recontextualizes human capital theory into the neoliberal language of competition. Assuming winning the future translates into economic growth, the question of who benefits is paramount in discovering the ideology behind the discourse. The first, obvious losers are the other competitors in the race, alternately the vague 'overseas' and elsewhere specifically China and India. Only residents of the United States constitute the set of potential winners. If the entire population of the U.S. gains equally from increased national prosperity, then it can be argued that this view of education serves the public goal of social democracy and comes from an ideology of democracy in which the public sphere is kept vigorous through a healthy economy. If, however, the gains benefit mostly the rich and powerful as Duménil and Lévy (2005) argue usually happens, education here serves the goal of social efficiency from an ideology of plutocracy. In this ideology, education benefits the entire public,

but it benefits them unequally. Those who control financial institutions and corporations benefit proportionally more from national economic prosperity.

The second, related problem Obama presents is the demise of American economic and educational competitiveness due to globalization. The new material conditions of massive job exportation and the resulting increase in underemployment motivate very real worries² about global economic competition in the voting public (Aronowitz, 2001). Obama neglects to mention the neoliberal policies that have created the conditions for this to happen and are taken for granted by government economists (Harvey 2005). He again offers education reform as one of the solutions. Thus, education serves superficially to bolster international ranking in standardized achievement and provide high-skilled labor to technology industry, but is powerless to stem the tide of manufacturing jobs from the U.S. to countries with fewer labor restrictions and poor working conditions. Harvey (2005) argues that competition for international rankings serves a specific purpose:

The neoliberal state needs nationalism of a certain sort to survive. Forced to operate as a competitive agent in the world market and seeking to establish the best possible business climate, it mobilizes nationalism in its effort to succeed. Competition produces ephemeral winners and losers in the global struggle for position, and this in itself can be a source of national pride or national soul-searching. (85)

Obama implores the nation to engage in soul-searching in Extract 5, citing statistics showing decline in educational superiority and asking whether the citizens of the U.S. are willing to do what it takes to rectify the situation. He ends with the incentive of national pride, that if all of the proposed education reforms are followed then the U.S. will once again lead the world in percentage of youth with a college degree. Obama attacks the discourse of neoliberalism,

² Aronowitz (2001) also argues that in post-industrial countries technology has become a proxy for labor in order to reduce costs and increase productivity, all while exacerbating unemployment. This view is corroborated by Obama's reference to the steel mill that matches the productivity of 1000 employees with only 100.

blaming both globalization and technology for economic demise. Yet he upholds global and local market competition and an exclusive focus on science and technology education as the solutions to social problems. In Obama's vision, only those that live in the United States, "are lucky enough to find jobs" and then work hard deserve to win; consequently everyone else loses. Further, only those who are able to complete higher education and obtain jobs in the technology sector are rewarded with respect and financial gain. Elsewhere in the SOTU, Obama implies that this is the idea America was founded upon. The education policies he promotes in the SOTU fit within this ideology, that of unregulated meritocracy. Only the states, districts and schools that adopt federal policy, referred to as either 'innovation' or 'reform', deserve to win taxpayer money. Again, everyone else loses. Obama does not delve into the specifics of education reform in the speech, but rather paints the broad strokes of education as a tool for the nation to win in the global marketplace. The prominence of the discourses of global competition and science and technology innovation not only marginalizes the discourses of education for social justice or democracy, but may be mutually exclusive with the foundation of public education that provides opportunities for success for all people. This contradiction is exemplified next in the order of discourse of the Blueprint for Reform.

Blueprint For Reform

"A Blueprint for Reform: The Reauthorization of the Elementary and Secondary Education Act (ESEA)" is the Department of Education's (DOE) proposal for the federal education policy they would like Congress to pass. It is not a technical policy document, but rather a promotional document with stylized graphic headings and photos of children and teachers throughout. It is, however, the most publicly accessible reference the education policy goals of the current DOE.

The Elementary and Secondary Education Act was first passed in 1965 by Lyndon Johnson in the 'War on Poverty' and provides federal money to states for education programs (Hanna,

2005). Throughout its history, the ESEA federal funds have been used to influence state and local education policy, especially in poorer areas that need the money most. The ESEA was initially intended to rectify financial imbalances between districts with varying tax bases in order to ensure that children in poorer areas received comparable education to their richer neighbors. Johnson also wielded it as a financial incentive to encourage Southern states to desegregate public schools. However, presidents since the inception of ESEA have viewed it as an opportunity to implement specific goals and standards for education, most recently with George W. Bush's reformulation of ESEA into No Child Left Behind (NCLB). A Clinton era education policymaker who worked on the 1994 ESEA reauthorization is quoted by Hanna (2005: np) as saying 'The underlying policy direction of NCLB is consistent with the 1994 reauthorization, but there's a level of prescription with respect to implementation that we would have been soundly criticized for trying to accomplish, had we done so.' The current Blueprint represents Obama's vision for the reformulation of NCLB back into ESEA.

Interdiscursive Analysis

The authors of the document support education for the purposes of democratic equality, social efficiency and social mobility. However, Prunty (1985) distinguishes between procedural policy and substantive policy. Procedural policy recognizes the importance of certain discourses but does not necessarily require implementation or institutional support for them. Substantive policy encodes action, either through enforced requirements or financial support. The Blueprint does not support all of the goals equally. The Blueprint references discourses related to the goal of democratic equality, but references are often procedural as opposed to substantive. The following extracts demonstrate discourses of social justice, democracy and liberal arts. All of the following extracts are cited with page numbers from the Blueprint for Reform (U.S. Department of Education, 2010).

A world-class education is a moral imperative – the key to securing a more equal, fair and just society. (1)

Students need a well rounded education to contribute as citizens in our democracy. (4)

Our proposal will provide competitive grants to states, high-need districts, and nonprofit partners to strengthen the teaching and learning of arts, foreign languages, history and civics, financial literacy, environmental education, and other subjects. (28)

The Blueprint makes several claims here about education serving the goal of democratic equality. It frames education as the ‘key to securing a more equal, fair and just society’, language from the discourse of social justice. Students should be able to ‘contribute as citizens in our democracy’, which would necessitate curriculum involving the liberal arts, history and civics. Later in the Blueprint, all of these subjects are mentioned as important ‘to strengthen’. The strengthening of subjects such as ‘foreign languages, history and civics, financial literacy, environmental education and other subjects’ is substantive but conditional, in that funding is determined based on a ‘competitive grant’. The Blueprint references the discourses of democracy, equal opportunity and social justice in other sections as well, making statements about the inclusion of students of all types and promoting community involvement.

We must recognize the importance of communities and families in supporting their children’s education... We must support families, communities, and schools working in partnership to deliver services and supports that address the full range of student needs. (1)

Every student should graduate from high school ready for college and a career, regardless of their income, race, ethnic or language background, or disability status. (3)

The Blueprint explicitly recognizes traditionally marginalized groups of students and includes them in the benefits of the ESEA. In these extracts several suggestions are made with varying modality. The statement ‘We must recognize the importance of communities and families’ strongly emphasizes the democratic involvement of communities and families, but the verb

‘recognize’ does little to reinforce this emphasis. The following sentence utilizes stronger language, ‘We must support families, communities and schools...the full range of student needs’ but does not define what those needs are. Later in the same section, the Blueprint defines its substantive purpose: ‘Every student should graduate from high school ready for college and a career’. The discourses of preparing for higher education and employment replace the discourses of social justice, democracy and liberal arts. This makes sense given Obama’s stated goal of leading in global college graduation.

That by 2020, the United States will once again lead the world in college completion. (1)

Obama mentions this goal in the State of the Union address as well, privileging it as the capstone of his section on education. The Blueprint includes the goal of career-readiness as well, and these two goals underpin everything from curriculum and assessments to the preferential awarding of grant money. Unlike the discourses of social justice and democracy, the Blueprint encodes these discourses with specific methods of implementation and financial support. Two of the requirements to ensure college- and career-readiness are:

States must have data systems in place to gather information that is critical to determining how schools and districts are progressing in preparing students to graduate from high school college- and career-ready. States and districts will collect and make public data relating to student academic achievement and growth in English language arts and mathematics, student academic achievement in science, and if states choose, student academic achievement and growth in other subjects, such as history. (9-10)

States will be required to develop comprehensive, evidence-based plans and to align federal, state, and local funds to provide high-quality STEM instruction. (26)

The Blueprint makes the collection of data a substantive policy, requiring it with the strong modals ‘must have’, ‘will collect’ and ‘will be required’. By requiring the collection of data supporting the specific goals of college- and career- readiness as well as English, math and science, the Blueprint privileges them. It also seeks to ‘align federal, state and local funds’ for

those same goals. The Blueprint does not require schools to create ‘data systems’ that gather information about students’ development of social justice or citizenship. It provides the option, only ‘if states choose’, to track growth in ‘other subjects, such as history’. Neither does the Blueprint require states to ‘develop comprehensive, evidence-based plans’ to provide for democracy or community involvement. By not requiring attention and resources for these other purposes, the Blueprint marginalizes these alternative discourses and makes its goals particularly clear. The distinction can be seen further in a provision for bilingual programs.

Grantees may provide dual-language programs, transitional bilingual education, sheltered English immersion, newcomer programs for late-entrant English Learners. (20)

The inclusion of support for English learners is procedural rather than substantial, as shown by the choice of the modalized verb ‘may provide’. In comparison with the aforementioned requirements for college- and career-readiness and STEM instruction, bilingual education is optional and not enforced. The subject choice of ‘Grantees’ implies that states that have already won competitive grants can provide bilingual programs, but that bilingual programs do not enhance a state’s competitive advantage during the selection process. The Blueprint also encodes its priorities by linking certain policies with competitive grant money while not linking others.

Priority will be given to states that have adopted common, state-developed, college- and career-ready standards. (2)

Our proposal will make available significant grants to help states, districts, and schools implement the rigorous interventions required in each state’s lowest-performing Challenge schools under the College- and Career-Ready Students program. (12)

The Blueprint privileges the discourses of core subjects, assessments, accountability, standards, data collection, school turnaround and competition by giving programs with these policies preferential grant status. States, local education agencies and teachers exist without significant agency in this competitive grant program, which is essentially a system of carrots and sticks that

ensures compliance with federal policy while encouraging competition for scarce resources between individual actors.

States will award the remainder of funds competitively to districts or partnerships of districts and nonprofit organizations to implement one of the following intervention models. (12)

Districts that have put in place the required evaluation systems may generally spend funds flexibly. (15)

Our proposal will continue competitive grants for states and school districts that are willing to implement ambitious reforms. (16)

Most districts will also be allowed to spend more ESEA program funds flexibly, as long as they continue to comply with the conditions associated with those funds and are improving student outcomes. (40)

In the above extracts, the Blueprint utilizes qualifiers and restrictive clauses to encode the discourse of hierarchical dominance and competition. In the first extract, states do not choose how to distribute money; they ‘will award the remainder of funds competitively’. In the second, only a restricted set of districts ‘that have put in place the required evaluation systems’ are free to ‘spend funds flexibly’, and even then this privilege is further restricted with the modal and adverb ‘may generally’. In the third extract, states are further characterized the dichotomy of willing or unwilling participants, with those ‘that are willing to implement ambitious reforms’ receiving continued support. This implies that states that are unwilling will not be supported by federal funds. In the fourth extract, the Blueprint utilizes the paternal discourse of permission and compliance. Districts will only be ‘allowed to spend more ESEA program funds flexibly’ if they ‘continue to comply with the conditions associated with those funds’. The Blueprint offers the same false choice as a strict parent: either the state can unquestioningly agree with the substantive policies or face punishment and sanctions.

Discussion of the Blueprint for Reform Analysis

The Blueprint does the most out of the three texts to balance the competing goals and discourses of education policy. The authors reference the discourses of social justice, equality and citizenship in several sections, explicitly including disenfranchised parties such as immigrants and people with disabilities. However, these discourses are for the most part what Prunty (1985) called procedural policy, in that they are simply proclamations of intent rather than action. The actual substantive policies in the Blueprint are related to the discourses of college- and career-readiness, data systems, accountability, and STEM instruction, similar to the policies Ball (1998) and Au (2009b) observed as resulting from the discourses of managerial efficiency and neoliberalism. States that include these ‘reforms’ in their own policies receive the carrots of competitive grant money and permission to spend that money ‘flexibly’. The states that do not include these reforms are punished either by not receiving federal funds or losing the privilege of deciding how those funds are spent. While the intention of the ESEA initially was to ensure equity in the provision of education, this equity is threatened by the creation of a competitive system in which states compete over scarce resources. The ideology that competition creates success and innovation is distinctly meritocratic. In this ideology, the most successful rise to the top, are rewarded, and become examples for all who did not measure up. However, as Labaree (1997) and others point out, the ideology of meritocracy is in some ways mutually exclusive with the ideology of social equality. Thus, while Obama and the authors of the ESEA consistently reference the discourses of social justice and equal opportunity, the distribution of limited funds through competitive grants contradicts those intentions by ensuring that only students in states in districts that ‘are willing to take on bold, comprehensive reform’ will benefit (U.S Department of Education, 2010: 7).

The other persistent theme in the Blueprint is college- and career-readiness. The Blueprint explicitly states throughout that these are Obama and the authors' underlying goals for education. First, privileging these two goals over all others marginalizes discourse of education for the purposes of democracy, social justice or equal opportunity. Second, as Aronowitz (2001) argues, the number of careers that require a college degree is much smaller than the population of working-age adults. Obama inadvertently admits this in the SOTU address when he cites the statistic that 'nearly half of all new jobs will require education that goes beyond a high school education' (Office of the Press Secretary, 2011: np). If 'nearly half' of all new jobs will require a college degree, than more than half will not require a college degree. Due to the increase in technology replacing workers and the exportation of manufacturing to countries with cheaper labor costs, a majority of these new jobs will be in the unskilled service industry, such as fast food or retail (Aronowitz, 2001). The promotion of college- and career-readiness for every student without employment opportunities to match leads to what Labaree (1997) calls credential inflation. When students compete for limited placement at the top of the social hierarchy, the value of a college degree goes down and is replaced by master's and other professional degrees. Obama's goal for every student to graduate college can do nothing about the vertical inequality of employment. The Blueprint states:

'The goal for America's educational system is clear: Every student should graduate from high school ready for college and a career. Every student should have meaningful opportunities to choose from upon graduation from high school. (8)

These pronouncements should not be conflated. While the ESEA at least has the potential to fulfill the first goal, no education policy is capable of creating substantial amounts of fulfilling employment. Ironically, many researchers argue that the same neoliberal discourse of competition and efficiency that the ESEA utilizes to distribute funds and enforce reform efforts is responsible for the loss of meaningful employment in the United States (Aronowitz, 2001; Au

2009b; Ball 1998; Duménil and Lévy, 2005; Fairclough 2001a, Labaree, 1997; Saunders, 2010; Weiner 2007). The final document analyzed is from a subprogram of the Blueprint called Race to the Top, a competitive grant program that encodes the underlying reward/punishment system of the Blueprint.

Race to the Top Executive Summary

While the Blueprint describes the intended design for the reauthorization of the ESEA, Race to the Top (RTT) is a subprogram of the Blueprint and was enacted as law in 2009. According to Obama in the 2011 State of the Union address (Office of the Press Secretary, 2011), the RTT competitive grant program accounts for about 1% of the federal education budget. However, it affects a larger percentage of the budget by restructuring the distribution of federal funds in the form of competitive grants. The RTT Executive Summary (RTT Summary) is a short document that outlines the criteria to apply for and potentially win competitive grants. The RTT Summary is not the grant application itself, but is the first representative document available on the Department of Education's RTT website. It represents Obama's significant contribution to education policy and in his words is 'the most meaningful reform of our public schools in a generation' (Office of the Press Secretary, 2011: np). According to Obama writing in the RTT Summary, RTT works by motivating states to implement federal education reforms with the hope of receiving money, even though not all states that apply actually receive grants:

Race to the Top will reward States that have demonstrated success in raising student achievement and have the best plans to accelerate their reforms in the future. These States will offer models for others to follow and will spread the best reform ideas across their States, and across the country. (U.S. Department of Education, 2009: 2)

RTT is substantive policy in that it regulates the flow of federal money to states and school districts. The RTT Summary contains four main sections: the Background and Overview, Priorities, Selection Criteria and Definitions. In the Background and Overview, the RTT explains

the nature of the competitive grant program and the program's overarching goals. To win the competition, states must develop applications that demonstrate the reforms that they have already implemented and plan to implement in the future. The Overview lays out a tableau of possible point values awarded for specific policy changes and proposals for each state's application. The Priorities section gives minimum eligibility requirements for entry into the competition and then describes six overarching policy goals that significantly influence the awarding of grants. Following this, the Selection Criteria section explains in more detail each of the possible policy changes mentioned in the Overview and what must be done to receive the maximum amount of points. The final section takes the form of an appendix that defines many of the terms used throughout the rest of the document.

The structure of the program itself positions states in a competition for limited resources which, in order to win, they must adopt the discourse and policy of the Department of Education (DOE). This conceives of federal education funding as a neoliberal market in which states that act in their own rational self interest are rewarded while states who neglect the market are punished. It is not, however, a truly free market because the DOE artificially determines what constitutes success and what constitutes failure. I address these determinations in the following analysis.

Interdiscursive Analysis

The appendix of definitions is the final section of the RTT Summary, but the definitions it provides texture the rest of the document. The RTT Summary is a legally binding policy document and in the legal policy genre, the semantic content of individual words is often represented by specific definitions of particular social actors, programs and commonly referred to concepts. In the RTT Summary, these definitions are powerful because they take words with broad semantic interpretations and assign a pre-determined semantic restriction based solely on

the perspective of the authors. This has the effect of assuming a consensus when in reality the definitions are highly contested. The definitions are structured in the format ‘X means:’ and then the definition, as opposed to a more restrictive equivalence such as ‘X is defined here as’. The RTT Summary uses its privileged status to redefine general terms such as student achievement and student growth. All of the following extracts are cited from the Race to the Top Executive Summary (U.S. Department of Education, 2009).

Student Achievement means –

(a) For tested grades and subjects: (1) a student’s score on the State’s assessments under the ESEA; and, as appropriate, (2) other measures of student learning, such as those described in paragraph (b) of this definition, provided they are rigorous and compatible across classrooms.

(b) For non-tested grades and subjects; alternative measures of student learning and performance such as student scores on pre-tests and end-of-course tests; student performance on English language proficiency assessments; and other measures of student achievement that are rigorous and compatible across classrooms.’ (14)

The included definition of ‘student achievement’ semantically reduces a broad concept, that could potentially include discourses of achievement in community involvement or achievement in the arts, to a score on either a standardized test, a classroom test, or ‘other measures’ that are ‘rigorous and compatible across classrooms’. ‘Student achievement’ thus marginalizes all other possible discourses and interpretations. ‘Rigorous’ and ‘compatible across classrooms’ are conspicuously undefined in the RTT Summary, and the meaning of these terms is left up for future interpretation. Since the Department of Education reviews all application material, they have the power to define these terms without dialogue or input from interested parties, silencing alternative discourse. The definition of student growth is similarly limited to standardized test scores by means of its reliance on student achievement:

Student growth means the change in student achievement (as defined in this notice) for an individual student between two or more points in time. A State may also include other measures that are rigorous and comparable across classrooms. (14)

This definition marginalizes the discourse of all other conceivable types of student growth, for example growth in maturity, growth in responsibility to the community, and growth in intellectual curiosity. These two definitions create a ripple effect in the order of discourse and semantics of the rest of the document, as many other definitions and policies rely on these two definitions:

Effective teacher means a teacher whose students achieve acceptable rates...of student growth (as defined in this notice)...teacher effectiveness is evaluated, in significant part, by student growth (as defined in this notice). (12)

Effective principal means a principal whose students ... achieve acceptable rates ... of student growth (as defined in this notice). (12)

High quality assessment means an assessment designed to measure a student's knowledge...Such assessments should enable measurement of student achievement (as defined in this notice) and student growth (as defined in this notice). (13)

Thus, the incredibly complex and contested concepts of what constitutes an effective teacher, an effective principal and a high quality assessment are semantically reduced to the change in standardized test scores over time. While this silences the discourses of education for personal growth, liberal arts, democracy or social justice, it is an efficient way to gather data and manage a large federal program for maximum efficiency. These and other definitions delimit the potential for dialogue in the rest of the document, as they pre-emptively assume the nature of desired outcomes for students. Other commonly used terms are not defined, however.

The State's application must comprehensively and coherently address all of the four education reform areas. (4)

The State's application must have a high-quality plan. (4)

In these two extracts, the adverbs 'comprehensively and coherently' and the adjective 'high-quality' describe ways in which states must construct their plans. The fact that these descriptors

not defined or explained reserves the power to define them for the Secretary of Education and the Department of Education. In a different manner from the aforementioned definitions of ‘student growth’ and ‘student achievement’, these definitions are restricted by their de facto interpretation. A plan that does not include all of the federal reforms might not be a ‘high-quality plan’ according to the DOE. The Summary uses undefined adjectives throughout in order to restrict the discourse of acceptable applications.

Applications in which the State’s participating LEAs (as defined in this notice) seek to create the conditions for reform and innovation as well as the conditions for learning by providing schools with flexibility and autonomy. (5)

Here, applications that ‘seek to create the conditions for reform and innovation as well as the conditions for learning’ are prioritized. This euphemism refers to applications that adopt the specific set of reforms proposed by RTT. Through this language, the RTT Summary construes of its own reforms as ‘innovation’ and ‘conditions for learning’, although for any possible reform these are empirical questions. The RTT Summary also uses the relative pronoun ‘that’ with restrictive clauses in order to construe its own proposed reforms as successful and effective. In the following extract, the RTT Summary supports:

Investments in innovative strategies that are most likely to lead to improved results for students, long-term gains in school and school system capacity, and increased productivity and effectiveness. (2)

Design and implement rigorous, transparent, and fair evaluation systems for teachers and principals that (a) take into account data on student growth (as defined in this notice) as a significant factor. (9)

In the first extract, investments in ‘innovative strategies’ is linked by a relative pronoun to the expected return: ‘results’, ‘capacity’, ‘productivity’ and ‘effectiveness’. This language comes from the discourse of Taylor’s factory system. Through this restrictive clause, the adjective ‘innovative’ is defined in terms of leading to these four outcomes. In the second extract, the descriptors ‘rigorous, transparent, and fair’ are linked by the relative pronoun ‘that’ to ‘take into

account data on student growth'. The RTT Summary presumes a consensus that this type of system is 'fair'. Again, the RTT Summary adopts language with subjective semantics and then supplies its own meaning. This is also done throughout a section detailing four 'core' reforms.

The first reform is shown in the extract below.

1. Adopting standards and assessments that prepare students to succeed in college and the workplace and to compete in a global economy. (2, numbering in original)

In the first core reform, the Summary uses the relative pronoun 'that' to logically link 'standards and assessments' to the restrictive clause 'prepare students to succeed in college and the workplace', and 'to compete in the global economy'. This assumes that one set of standards and assessments exists and can accomplish those goals. The other implicit assumption is that this is an exhaustive list of ways in which students can succeed in the world. The second core reform uses a similar relative pronoun with a restrictive clause to assume the efficacy of 'data systems'.

2. Building data systems that measure student growth and success, and inform teachers and principals about how they can improve instruction. (2, numbering in original)

The relative pronoun, 'that', links 'data systems' with 'measuring student growth and success' as well as 'inform teachers and principals about how they can improve instruction'. Because 'student growth' is defined as the change in standardized test scores over time, a data system would be capable of tracking this information. However, 'success' is not defined in the RTT Summary. If 'success' must be monitored in the form of data, than it cannot include qualitative and holistic assessments and must refer to test scores as well. The second restrictive clause assumes that these particular data systems are indeed capable of helping teachers and principals improve instruction. The last two reforms include semantically restricted terms but that are explicitly defined. The third core reform refers to 'effective teachers and principals', which

according to the given definitions relates to increasing students' performance on standardized tests.

3. Recruiting, developing, rewarding, and retaining effective teachers and principals, especially where they are needed most. (2, numbering in original)

4. Turning around our lowest-achieving schools. (2, numbering in original)

The fourth core reform proposes 'turning around' low achieving schools. The metaphor 'turn around' is related to the phenomenon of traveling in the wrong direction, realizing that a correction must be made, and then traveling back to a known location to begin the journey again with more information. The concept of 'turning around' in the RTT Summary is specifically defined, however, with four models that involve firing various percentages of teachers and administrators or closing the school. In no way does any involved party 'turn around'; a more apt metaphor might be 'shut down'.

In addition to constructing power through explicitly and implicitly assigning semantics to broad concepts, the RTT Summary represents various social actors within a power hierarchy enforced through grant distribution. The RTT Summary positions Arne Duncan as the most powerful figure in this vertical hierarchy by giving him the final review of each application. Each of five priorities begins with the following phrase, conjuring imagery of a paternalistic secretary that does not consult involved parties to make decisions.

The Secretary is particularly interested in applications. (4-5)

Each state, in the Summary 'the State', has the power to change its policies in order to apply for federal grants. In contrast, Local Educational Authorities (LEAs) hold positions of relatively little power. They are defined by whether or not they choose to participate in the state's reforms.

Participating LEAs means LEAs that choose to work with the State to implement all or significant portions of the State's Race to the Top plan. (15)

The Summary represents LEAs in the dichotomy of willing or unwilling participants. LEAs that do not ‘choose to work with the State’ do not receive a portion of the federal grant if the state wins. In the following extracts the LEAs exist in various grammatical formations that reduce their agency.

The State must demonstrate in its application sufficient LEA participation and commitment to successfully implement and achieve the goals in its plans. (4)

And it must describe how the State, in collaboration with its participating LEAs. (4)

Articulating State’s education reform agenda and LEAs’ participation in it. (6)

In the first extract, the state is responsible for the application but ‘must demonstrate ... sufficient LEA participation and commitment’. The state does not need to demonstrate total participation, and sufficient is not defined. In the second and third extracts, states are fronted as the lead agent while LEAs are subordinated by the phrases ‘in collaboration with’ and ‘participation in it [the State’s reform agenda]’. LEAs have a choice to participate in the State’s adoption of RTT reforms or not, but to make sure the ‘participating LEAs’ implement the required federal reforms the managerial discourse of contracts is involved as shown in the following extracts.

Terms and conditions that reflect strong commitment by the participating LEAs. (6)

Scope-of-work descriptions that require participating LEAs (as defined in this notice) to implement all or significant portions of the State’s Race to the Top plans. (7)

If the LEAs choose to implement the federal RTT reforms and for some reason they don’t work, the managerial discourse of accountability ensures that they have only themselves to blame. The Summary makes no mention of federal or state responsibility for the efficacy of policies, only that LEAs are ‘accountable for progress and performance’.

Supporting participating LEAs (as defined in this notice) in successfully implementing the education reform plans the State has proposed though such activities as ... holding participating LEAs (as defined in this notice) accountable for progress and performance, and intervening when necessary. (6)

The extract construes ‘holding accountable’ as one way of ‘supporting’. The language of ‘holding participating LEAs accountable’ fits within the discourse of rewards and punishments that constructs power throughout the RTT Summary.

Discussion of Blueprint for Reform Analysis

The Race to the Top Executive Summary (U.S. Department of Education, 2009) promotes the managerial efficiency discourse with an emphasis on standardized tests and data collection and the discourse of neoliberalism by structuring the program as a competitive market of scarce federal resources in order to promote ‘innovation’ and ‘reform’. The name and nature of the program itself invoke competition; states must race to change their education policy according to the desires of the federal administration in order to get to the top of the non-inclusive list of candidates for competitive grants. Schools compete against each other in arbitrary measures of performance as well as for funding with the looming threat of closure under the euphemism of ‘school turnaround’. Principals and teachers must race to ensure that their students perform better than other students on high-stakes standardized tests lest they risk not being defined as ‘effective teachers’ that don’t facilitate ‘student growth’. The discourse of neoliberalism, which RTT explicitly adopts, posits that increased competition leads to progress and ‘innovation’ (Harvey, 2005). However, by defining ‘innovation’ and ‘success’ as a set of specific, non-debatable policy reforms, RTT only encourages its own hegemony. In addition, RTT does not mention the potential social cost. Earley (2000) warns of the dangers in competitive allocation of resources:

A market policy lens is based on competition, winners and losers, and finding culprits. Yet teachers must assume that all children can learn, so there cannot be winners and losers. Market policies applied to public education are at odds with collaboration and cooperative approaches to teaching and learning’ (p. 36-37)

Informed by neoliberal discourse on one hand, the RTT Summary’s use of managerial efficiency discourse depersonalizes the involved social actors, defining them by test scores and other data-

based outcomes and representing them as either passive cogs in the machine or obstacles to be removed. By defining success for students, teachers, principals and schools as the change in standardized test scores over time, RTT marginalizes any measure of success that cannot be quantified and stored in a data system. These alternative measures of success include the discourses of education for social justice, democracy, liberal arts and personal growth and maturation. If the data does not show that students are being prepared for ‘college- and career-readiness’ then accountability is invoked and teachers and principals are fired, money or flexibility in spending is taken away or through refusing to award a competitive grant that money is not given in the first place. States that agree with the primacy of standardized testing and assessment linked to accountability reward systems are themselves rewarded by the RTT, while states or LEAs that disagree are dismissed as not being ‘innovative’ or not having a ‘high-quality plan’ to ‘create the conditions for learning’.

Intertextual Analysis

In the analysis of each text, I focused on themes that I thought characterized the texture of each document. In the State of the Union (SOTU), Obama used semantic juxtaposition and a problem-solution narrative to represent America as losing the global competition for scarce resources. He cited one of these scarce resources as employment, and proposed that specifically math and science education was one of the keys to ‘winning the future’ of global employment competition. Using the discourses of neoliberal competition as well as national economic prosperity, Obama positioned education as serving the goals of social efficiency and social mobility. He argued that education was a way to ensure both personal success and national success in the face of globalization. In the Blueprint for Reform, Obama and his administration laid out a plan for the federal Elementary and Secondary Education Act to ensure that all students graduate high school ‘college- and career-ready’. The Blueprint referenced discourses of

inclusion, equity, social justice, liberal arts and citizenship but did not include substantive policy that funded efforts to promote these discourses. The substantively supported discourses in the Blueprint include the discourse of neoliberalism in the form of competitive grant programs, meritocratic high-stakes standardized tests and punishment-reward systems of accountability and the discourse of managerial efficiency with an emphasis on the construction of data systems and STEM instruction. The Race to the Top (RTT) Summary exhibited a hierarchical power distribution from two sources, the Secretary of Education and high-stakes standardized tests. In overseeing the distribution of competitive grants, the Secretary and Department of Education hold the power to define what constitutes high-quality education reform and innovation. By defining the fundamental concepts of student growth and student achievement in terms of the change in test scores over time, the RTT Summary defines success in a way that marginalizes alternative views of learning and assessment.

These three documents constitute a genre chain of interrelated texts. Each document has varying types of power. The SOTU is the most publicly visible text and holds rhetorical power. The Blueprint is a superficial policy brief that holds potential power if it is incorporated whole or in part into law. The RTT Summary holds actual power as it has already been enacted into law and controls the distribution of federal money to states for public education. The three documents privilege and marginalize various discourses with regards to education, and due to the power each document wields the order of discourse has implications for policymaking as well as the students, teachers, principals, schools, districts and states that live with the policies. The order of discourse in these texts also provides evidence to further understand the ideologies and goals that the authors have for education and society in general. Obama and his administration believe that education should serve the meritocratic ideology of competition and personal

advancement while also serving the plutocratic ideology of advancing an unequal national economic economy. In Labaree's (1997) taxonomy these are the goals of social mobility and social efficiency respectively. Education for democratic equality is included in non-binding ways throughout each document but does not influence substantive policy in a significant manner. These findings fit within what Au (2009b) and Ball (1998) describe as the global movement towards education policy based on neoliberal competition and data-drive managerial efficiency.

They also answer Au's question:

The key issue will revolve around two sides of the same accountability coin: how will achievement be measured, and how will failure be defined? But, in answering this question, can Obama give up the tests, the businesslike accountability, and the commitment to school "choice," competition, human capital, and merit pay? (2009b: 317, quotations in original)

For states and districts, Obama defines success as conforming to federal policy guidelines in order to win competitive grants, while he defines failure as a refusal to adopt federal policy with the punishment being de facto economic sanctions. For students, Obama defines success as the improvement in standardized test scores over time with the reward being ephemeral employment and higher education opportunities and failure to improve leading to firing teachers and school closings. Accountability, school choice, competition, human capital theory and merit pay are all explicitly encoded in both the Blueprint and the RTT Summary and are characterized as being bold and innovative reforms. As shown throughout the analysis, the discourse works to represent these policies as consensus opinion, inherently effective and the keys to success in public education. But the success Obama envisions for education may not be the same success parents, teachers and students want for education.

The overall order of discourse of the analyzed texts delimits the discourse in schools and classrooms by way of Bernstein's (1996) pedagogic device. Competitive grants, school turnaround policies and accountability systems work at the level of distributive rules to

determine who is and is not able to teach and the funding they receive. Emphasis on English language arts and STEM recontextualizes English, math and science as the most valuable subjects while devaluing the discourse of other learning. Finally, as described previously, the use of data from high-stakes standardized testing to make important decisions operates at the level of evaluative rules to control the possibilities for curriculum and pedagogy. Simply put, the order of discourse in this education system is that achievement is important but learning is not, teachers and schools are held responsible for all achievement regardless of outside factors and if students do not perform well than they risk losing human and financial resources. When standards and assessments are designed without the input of students, teachers, parents or community leaders, the public sphere collapses and democracy is impossible.

As Labaree (1997) argues, deciding what education policy should look like is not a technical matter but a political matter; that is, deciding what purpose education should have. It seems fairly clear that education is important to the Obama administration, but perhaps not for the same reasons that education is important to other groups such as teachers or students in low-income communities. As opposed to the ideology of social democracy that many supporters hoped Obama would represent, with regards to education policy he seems to be not only continuing the conservative status quo of his much-maligned predecessor but also injecting a neoliberal doctrine of competition that further stratifies winners and losers (Au, 2009a). That Obama is informed by the ideology of meritocracy is no secret, but that he supports similar education policies to neoconservatives seems unthinkable to many of his progressive supporters. Referring to Obama's economic policies, Greenwald (2011) argues that Obama has been centrist, or even slightly conservative all along. He says that the Democratic base just doesn't want to admit it.

Whether in economic policy, national security, civil liberties, or the permanent consortium of corporate power that runs Washington, Obama, above all else, is content to be (one could even say eager to be) guardian of the status quo. (Greenwald, 2011, np)

Regardless of whether Obama falls on the left, center or right in American politics, the fact remains that his vision for education marginalizes the discourses of social justice, equity, democracy, liberal arts and personal growth for the discourses of managerial and financial efficiency, neoliberal competition for scarce resources, and supporting a stratified employment system for national economic growth that benefits the wealthy elite.

CHAPTER 5 CONCLUSION

In my study, I first surveyed the theoretical and historical landscape of critical research into education policy and then constructed a model connecting work done in educational philosophy, history, economics, critical discourse analysis and critical education policy analysis. I conducted a critical discourse analysis on each of three texts that represent Obama and the Department of Education's vision for federally funded public education in the United States. I found that while the texts made reference to discourses such as social justice and liberal arts in procedural policy, the texts enforced and financially supported discourses of neoliberal competition, managerial and financial efficiency and national economic interests as substantive policy. By applying my model to these findings, I argued that Obama and the Department of Education view public education as serving primarily the goals of social efficiency and social mobility. Further, I argued that Obama can be characterized as utilizing discourses stemming from the ideologies of meritocracy and plutocracy by proposing an education system that encourages competition for scarce resources but does little to rectify socioeconomic inequality and in fact may reproduce it.

How could public education be different? Defenders of the types of reforms Obama promotes may argue that an efficient, data driven system is necessary for the large-scale operation of public education in a nation of 400 million people. They might also argue that the market forces of competition for scarce resources constitute a healthy dose of reality for a bloated government agency and that if the real world is not fair and just than public education should not be either. However, despite the pessimistic findings of my study I submit that alternatives exist. They must exist, if we are to believe that we have any say in the future direction of society. Instead of asking the question of what education policies and systems

provide the best results, we should be asking the question of what results do we want. What is it that students should get from public school, and what values do we as a society want to exemplify? So far, people like John Bobbitt and Friedrich Hayek have dominated the answers to these questions, but we could potentially see a constellation of truly progressive thinkers shaping the debate around public education policy. My thesis is a reminder that just because a politician looks and sounds progressive on a certain issue does not mean that they really are. With further research into policies that promote education for democratic equality without alienating the pragmatists, centrists and managers whose opinions carry significant weight, we might be able to steer the federal education system in a more just and democratic direction.

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BIOGRAPHICAL SKETCH

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