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# The Importance of National Identity in Social Studies Classes in Puerto Rico: An Examination of Teacher and Student Perceptions of “Lo Nacional”

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THE IMPORTANCE OF NATIONAL IDENTITY IN SOCIAL STUDIES CLASSES IN  
PUERTO RICO: AN EXAMINATION OF TEACHER AND STUDENT  
PERCEPTIONS OF “LO NACIONAL”

BY

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## ABSTRACT

The Commonwealth of Puerto Rico, an unincorporated territory of the United States, is home to approximately 3.4 million U.S. citizens. The literature on Puerto Rican national identity (PRNI) describes how and why it has been debated on the island for more than five hundred years throughout the colonial trajectory, once under Spain and now as a commonwealth of the United States.

The education system in Puerto Rico, and particularly the social studies curriculum, has been used to promote particular ideologies regarding national identity. This study identifies what middle school teachers teach about PRNI and how seventh grade students identify themselves in terms of national identity. The investigation of curriculum delivery examines the elements that foster the Puerto Rican national character. Social studies educators who neglect the multiplicity of Puerto Rican identities fail to acknowledge that educational practices should be inclusive of the diverse understandings of PRNI. Such an acknowledgement needs to be incorporated to social studies classes where teachers discuss Puerto Rico's relationship with the United States. Examining social studies classes in Puerto Rico becomes the ideal context to develop conjectures about PRNI that include a transnational identity beyond the nation-state paradigms.

Using a mixed method approach with a concurrent embedded strategy, I identified student perceptions about PRNI, which differ from those of educators. Teachers' perceptions, citizenship, ethnic identity, and political ideology become intertwined with the delivery of social studies classes. Nevertheless, students develop their own perceptions of PRNI with only minor reference to the social studies class.

Students express dissatisfaction with their social studies classes. They also assign a high level of importance to PRNI, express a strong feeling of belonging to the Puerto Rican nation, and describe markers of national identity. The previous categories become pivotal considerations for the assessment of content-rich social studies lessons.

*Keywords:* national identity, Puerto Rico, social studies, political status, transnationalism, commonwealth, U.S. citizenship, colony

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## CHAPTER ONE

### INTRODUCTION

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My first day as a student-teacher started on a fresh, but tropical morning in a central municipality of Puerto Rico (PR), one of the Great Antilles of the Caribbean region. This town is located marginally to La Cordillera Central, Puerto Rico's central chain of mountains. On this morning, I was a step closer to becoming a certified social studies teacher. The idea of becoming an educator made me feel important and privileged, because I have always believed that teachers impact the life of an individual profoundly. However, I was overwhelmed with such enormous power and responsibility. These thoughts inspired a deep reflection as I prepared myself to enter the school where I was assigned to conduct my student-teaching practicum.

As I was entering the school, I experienced many emotions. I noticed that several 7<sup>th</sup> graders were staring at me, and their persistent look produced discomfort as I was walking through the hallways of the school looking for my cooperative teacher's classroom. Some students stared at me with curiosity, while others made comments to themselves: "ese mijtel," a student said, "está peldío"<sup>1</sup> [That teacher is lost]<sup>2</sup>. Other students talked to each other. After searching for a while, I finally I found the cooperating teacher's classroom. I waited on Mr. Santos to open the locked doors before I could introduce myself. I looked at Mr. Santos and said hello. <sup>3</sup> Mr.

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<sup>1</sup> Mijtel is an Anglicism for mister. Students usually refer to a male teacher as such.

<sup>2</sup> Throughout the chapters, I will use brackets following any statement that needs translation into English, e.g. "ese mijtel," a student said, "está peldío" [The teacher is lost].

<sup>3</sup> All names are pseudonyms.

Santos, a well-known teacher in the region, looked at me with a sharp face and said with a firm and commanding voice: "¡Bienvenido, maestro!" [Welcome, teacher]. Among his credentials, Mr. Santos possessed a Master's of Arts in History and nearly 30 years of experience teaching middle school. When Mr. Santos opened the door of his classroom, I felt relief from the initial discomfort I experienced upon my arrival. However, Mr. Santos's commanding presence increased my confidence. I thought that I was lucky to have him as a cooperating teacher. To me, the opening of the classroom's doors represented an invitation to love the education field and not to fear the adventurous journey that I was about to start. Today, that journey continues with this dissertation.

As Mr. Santos opened the classroom, students were talking, but taking their seats. It was the beginning of the winter-spring semester and students were returning to school after the winter break. "Bueno, ¡dígame cómo la pasó en las Navidades!" [Well, tell me how your holiday season was!], Mr. Santos said. Students enthusiastically talked about their experiences: some students described their Christmas presents, others talked about how much food they ate, others just listened to what their classmates had to say or chatted with their neighbors. With no time to lose, Mr. Santos asked students to look for their textbooks and to find the bookmark for the last day of class. This page had the last topic covered during the fall semester. Most students started to look for the book and skimmed through the text silently getting ready to start class at once.

I was observing the class from a small desk at the back of the room. Student-teachers had an assigned seat in Mr. Santos's classroom. Mr. Santos began by asking



questions about the readings. The last topic covered during the previous quarter was the Spanish colonization of PR. He asked students about how Spanish conquistadors initiated colonial industries in the Caribbean region: agriculture, settlements, slavery, and the exploitation of land. "¿Para qué vinieron los colonizadores españoles a América?" [What was the purpose of the Spanish conquistadors in America?], Mr. Santos asked. Not many students seemed interested in the teacher's question, as only a few responded quietly. Mr. Santos employed the Socratic Method; a traditional educational strategy and form of inquiry in the social studies (Paul & Elder, 2007; Saran & Neisser, 2004). However, I recall Mr. Santos answering the previous question himself.

Mr. Santos continued asking questions, one after another. One student raised his hand and said: "Míjtel, ¿por qué todavía somos una colonia?" [Teacher, why is it that we are still a colony?]. His question caught my attention. My initial thought was: "Where did that come from?" I speculated about who told this kid that PR, as the student put it, is a colony, or that they were colonized subjects. That question stuck with me for many years. I could not help but wonder about what would lead a twelve-year-old student to suggest that Puerto Rico is a colony. The question caught the attention of some students in class, as well that of Mr. Santos. Students watched Mr. Santos's face, waiting anxiously for a simple, but convincing and understandable answer. Unfortunately, no single answer exists to the critical question of Puerto Rico's centenary colonial condition (see Review of Related Literature for further details on page 17).

To address the student's question, Mr. Santos explained that Puerto Rico has

been a colony for more than five centuries, once as a Spanish colony and now as an unincorporated territory of the United States. Mr. Santos described features of Puerto Rico's history pertinent to the Review of the Related Literature of this dissertation. For example, he discussed how Spain colonized Puerto Rico during the 16<sup>th</sup> century and how the island remained a Spanish possession until 1898. Mr. Santos also emphasized that throughout this period, Puerto Rico experienced oppression and suffered economic exploitation, among other tragedies associated with its colonization (Morales-Carrión, 1983; Picó, 1986, 2006; Scarano, 1993). As a territorial possession of the U.S., Mr. Santos indicated that Puerto Rican national identity was at risk because of the Americanization process and the militarization of the island that took place after the end of the Spanish-American War (Barreto, 2002; García-Muñíz, 1993; Negrón de Montilla, 1970). Mr. Santos also explained to the students the territorial and colonial nature of the commonwealth status, also known as *Estado Libre Asociado* (ELA for its Spanish acronym) and how Puerto Ricans have celebrated three plebiscites or referendums in regards to Puerto Rico's status.

Mr. Santos indicated that Puerto Rican voters had had the opportunity to end the current commonwealth status and to opt for either *la estadidad* or *la independencia*. According to the teacher, the commonwealth status is colonial in nature. Estado Libre Asociado, which translates to Free Associated State, is the nomenclature through which Puerto Rico's constitution and the commonwealth status is known. Ratified by Puerto Ricans in Constitutional Assembly and by the U.S. Congress, on July 25th, 1952, *La Constitución del Estado Libre Asociado de Puerto Rico* was enacted. A plebiscite is an electoral consultation, similar to a referendum,

through which Puerto Rican voters residing on the island vote on several options regarding its political status. La estidadad, or statehood, refers to the political condition through which an unincorporated territory of the U.S. becomes a state of the union in conjunction with the rest of the states (Grupo de Investigadores Puertorriqueños, 1984; López Baralt, 1999). On the other hand, la independencia, which means independence, refers to how a territory becomes an independent sovereign nation-state where no foreign state exercises authority (Grupo de Investigadores Puertorriqueños, 1984; López Baralt, 1999)

As of 2017, Puerto Ricans have celebrated four plebiscites. In 1969, Puerto Ricans favored the commonwealth status over statehood and independence. In 1992, Puerto Rican voters once again supported the commonwealth as the preferred political status for the island. In 1998, Puerto Ricans celebrated another plebiscite, but this time introduced two new options on the ballot: Libre Asociación [Free Association] and Ninguna de las Anteriores [None of the Above]. This time, None of the Above defeated all status options under a particular set of historical circumstances, including discontent with the governor at the time, Pedro Rosselló. Fourteen years later, in 2012, during the general election vote, Puerto Ricans were presented with an additional ballot with two questions:

- Do you agree that Puerto Rico should continue to have its present form of territorial status?
- Regardless of your selection in the first question, which of the following non-territorial options would you prefer?

Out of a total of 1,878,969 registered voters and with a participation rate of 78%,

close to 54% (970, 910) of voters rejected the current commonwealth status. For the first time, statehood received 61% (834,191) of the vote. Pro-commonwealth and pro-independence supporters argued against the validity of the results given the number of blank ballots cast for the second question (498, 604). However, the Puerto Rican Supreme Court has determined that a blank ballot cannot be considered a vote. Thus, statehood received clear support for the first time in PR.

Mr. Santos, then, expressed the idea at the heart of this research project: the links between Puerto Rican identity and political status. The teacher explained to the class that, in his view, those who would perceive themselves as *boricuas the pura cepa* (pure breed Puerto Ricans) would only favor independence for the island. On that day, as my student-teaching session came to an end, my understanding of Puerto Rican national identity and the principles that foster it were intellectually challenged. When the cooperating teacher directly suggested that Puerto Ricans who do not support independence are far from being Puerto Ricans, he challenged my identity as a young Puerto Rican man.

I am an open supporter of statehood for the island and believe that Puerto Ricans should decide between becoming a state or an independent nation-state. I also believe that Puerto Rico's current relationship with the U.S. is colonial in nature. Thus, am I Puerto Rican? Am I not? What am I, then? Who is to tell whether I am Puerto Rican or not? Who has control over Puerto Rican identity? The teacher? Is identity contextual? Needless to say, I disagreed with the teacher's statement. Mr. Santos's statement compelled me to pursue a comprehensive understanding of Puerto Rican national identity and how it is taught in the 7<sup>th</sup> grade social studies class.

Throughout my career as an educator, I have focused on providing students with content-rich social studies classes to expose students to a variety of perspectives regarding identity. Although I started my teaching career teaching dual-language students in a school district in Illinois, fostering students' identity always has been the center of my professional practice. I present this case study of Puerto Rican students on the island to address critical components of national identity. Puerto Rico's colonial condition presents a fertile ground to question concepts traditionally associated with national identity, such as language, citizenship, culture, folklore, jurisprudence, and historical accounts. Failure to educate students and promote critical thinking skills in regards to these layers of knowledge may result in reinforcing the island's current colonial condition (Eliza Colón, 1989).

### **Defining Puerto Rican Identity**

Scholars in Puerto Rico argue that Puerto Rican identity coalesced during the 19<sup>th</sup> century (Acevedo Segarra, 1984; Duany, 2002b; Picó, 2006; Sánchez, 2008; Scarano, 1993). In 1953, el *Partido Independentista Puertorriqueño* [the Puerto Rican Independence Party] discussed Puerto Rico's historical background before the United Nations, stating: "A specifically Puerto Rican personality began to take form during the 18<sup>th</sup> century, and by the 19<sup>th</sup> century, Puerto Rico had all the attributes of a clearly defined people, conscious of their own cultural identity" (p. 2). *El jíbaro*, the Puerto Rican peasant, depicts and represents Puerto Rican character in the literature of the island, and has become the icon of Puerto Rico's colonial tragedy. The Puerto Rican peasant emerged as the "embodiment of a national culture [an identity]" (Acevedo-Segarra, 1984, p. 13). Manuel Alonso (1967) portrayed the Puerto Rican peasant as a

poor land worker relying on the produce of the land for his survival to represent Puerto Rican national identity. El jíbaro of the 19<sup>th</sup> century became Puerto Rico's national symbol. The Puerto Rican peasant also represented the Puerto Rican Creole, a conjoined culture of survival, that describes how the people in the island has survived the fatalism of several disgraces such as hurricanes, earthquakes, invasions, abandonment, hunger, disempowerment, disenfranchisement, and poverty. These tragedies are a handful of the catastrophes el jíbaro has overcome given his resilient character and hardworking spirit.<sup>4</sup>

Antonio S. Pedreira (1934) in his masterpiece, *Insularismo*, explores what it means to be Puerto Rican. In his vision of Puerto Rican identity, Pedreira takes into account the cultural blend of indigenous Taíno Indians, African slaves, and Spanish conquerors that form the Puerto Rican character. Pedreira also acknowledges the American invasion of the island as an important piece of PRNI. However, Juan Flores (1993), an influential contemporary Puerto Rican writer, criticized *Insularismo* and concluded that Pedreira based his ideas about Puerto Rican-ness on the visions of the Spanish elite of the 1920's. Flores claimed that Pedreira's work was a rhetorical illustration of an intellectual movement of the time known as the Arielist.<sup>5</sup> However, contemporary discussions on Puerto Rican identity have produced a continuum of visions regarding *la puertorriqueñidad* [Puerto Rican-ness] (Barreto, 2001).

Along this continuum of ideas, Jorge Duany (2002b), Juan Flores (2000), and Carlos Pabón (1995) are pivotal to this research. These scholars provide examples of how

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<sup>4</sup> The Puerto Rican Creole refers to a Caribbean person of European ancestry. Somebody who comes from a Caribbean or Latin American country and is of European, especially Spanish descent. Encarta dictionary.

<sup>5</sup> The Arielist were an elitist, individualistic and rhetorical intellectual movement that dominated the Spanish speaking intellectual world in the early 20<sup>th</sup> century. (Flores, 1993).

Puerto Rican identity may be displayed and interpreted through multiple lenses. Duany described the Puerto Rican nation as a country on the move, meaning that the Puerto Rican sense of national identity does not depend on the borders of a state. Rather, Puerto Ricans traveling back and forth between the mainland United States and the island of Puerto Rico represent an identity on the move with little regard to the existence of a political Puerto Rican state. Similarly, Flores insists that the case of Puerto Rico suggests the existence of a cultural nationalism independent of the consolidation of Puerto Rico as a sovereign state. In other words, the consolidation of PRNI is not necessarily connected to the political apparatus of the nation-state. Rather, cultural nationalism in Puerto Rico developed without the sovereignty that accompanied the consolidation of nation-states during the 19<sup>th</sup> century. In fact, Puerto Rico could be best described as a stateless nation, a nation with a strong sense of identity, but with little desire to become a national independent state (Duany, 2002a; Pabón, 2002). Therefore, Puerto Rican identity is a cultural artifact and not political in its nature. Finally, Pabón discusses that being Puerto Rican entails multiple meanings. Pabón uses García-Canclini's discussion on hybridity to explain the distinctiveness of the Puerto Rican culture (García Canclini, 2001, 2005). Within the context of hybridity, Sánchez (2008) stated that: "Like identity itself, Puerto Rican-ness is far from being absolute, but rather is characterized by hybridity and complexity" (p.71). After considering Puerto Rico's historical trajectory as an Afro-Caribbean nation in association with the United States (Duany, 2002b), the identification as *puertorriqueño* [Puerto Rican] embraces new meanings (Juhász-Mininberg, 2003). These definitions become pluralistic in nature (Pabón, 1995), as Puerto Rican identity is contextual, meaning different things to different people at different places in different times (Sánchez, 2008, p. 71).

## **Background**

During my teacher preparation program at the University of Puerto Rico, I had the opportunity to sit in class with Dr. Rafael Aragunde, whose educational philosophy profoundly influenced my academic career. Dr. Aragunde, a well-respected professor who later became Puerto Rico's Secretary of Education, advocated for the development of critical thinking skills to strengthen the academic ability of college students. Dr. Aragunde invited students in his classes to be proactive critical thinkers rather than passive recipients of instruction. I took his advice seriously and became involved in many institutional committees and student organizations. I feel privileged that he accepted to be on my dissertation committee.

Among his many academic contributions, Dr. Aragunde reviewed the role of the University of Puerto Rico on the island by examining its relevance in higher education (Aragunde, 1996). At the college level, Dr. Aragunde critiqued the Humanities program and suggested an innovative approach to the Western Civilization course. The former chancellor argued that college students need to learn about their cultural heritage before learning about classic civilizations. “Why do we have to study the Romans and the Greeks if we do not even know ourselves?,” Aragunde would say. Dr. Aragunde offered an experimental Western Civilization course that provided students with the opportunity to study Puerto Rican culture from the perspective of a critical thinker. As an alternative to studying classic civilizations, students were expected to describe and appreciate sociocultural attributes associated with *la puertorriqueñidad*. In that sense, Dr. Aragunde's approach invited students to know their cultural heritage before studying other cultures. Finally, in his many



academic lectures, he would romanticize higher education, promoting the idea that as universities should encourage *el amor por los saberes*, one's passion for a subject of study. More specifically, la Universidad must promote students' passion for liberal arts education.

Dr. Aragunde introduced me to Paolo Freire's *Pedagogy of the Oppressed* (Freire, 2000). Freire called for an education reform and used the metaphor of banking to illustrate how content knowledge is deposited into students' minds, similar to depositing money into a bank account. Freire suggested that education should be a liberatory process (Freire, 1998), a process where students are free of oppressive pedagogical practices. Similar to banking education, Bereiter & Scardamalia (2005) echoed Freire's words and warned educators about the dangers of students memorizing factual knowledge. They argue that learning only factual knowledge is similar to storing goods uselessly into a kitchen's cabinet. Based on these experiences, I decided to examine with a critical lens particular elements of identity that foster a way of being in PR.

The experiences with Dr. Aragunde and Mr. Santos triggered a personal and deep reflection about what it means to be Puerto Rican. My academic journey begins with interest on how education impacts interpretations of Puerto Rican national identity. Thus this research focuses on how social studies educators teach social studies, using Puerto Rican national identity or identities, so to speak.

### **Purpose of the Study**

This study examines the delivery of social studies classes in PR. Examining the delivery of social studies classes in PR, a commonwealth of the United States, shows what is taught about Puerto Rican national identity (PRNI) and how 7<sup>th</sup> grade social

studies students identify themselves regarding national identity as a result of schooling. In PR, the social studies curriculum has been used historically to promote particular discourses of Puerto Rican identity through Puerto Rico's colonial trajectory, first with Spain and now as a commonwealth of the United States. In turn, the 7<sup>th</sup> grade social studies class becomes a critical course in the configuration of a national identity, impacting students' understanding of the nation-state relationship. The development of content-rich curriculum guides depends on the identification of themes associated with national identity in the social studies and how teachers deliver such themes in their classrooms. Analyzing teacher and student data obtained from observations, focus groups interviews, and a survey will show the themes and concepts associated with PRNI in the delivery of social studies classes. A mixed method research design with a concurrent embedded strategy will provide the appropriate research context to examine not only what is being taught about national identity, but also students' level of identification with PRNI, a central concept in the social studies curriculum. I advocate for a malleable, fluid interpretation on Puerto Rican identity (Pabón, 1995, 2002), one that contests an "essentialist and homogenizing [Puerto Rican] image of collective identity that silences the multiple voices of the nation..." (Duany, 2002b, p. 20).

The research will invite educators to present content-rich lessons in response to a pluralistic and globalized society that acknowledges a continuum of discourses of Puerto Rican national identity. Parker (2002), for example, argues that a pluralistic society struggles with questions of identity: "How can we live together justly, in ways that are mutually satisfying, and which leave our differences, both individual and group, intact and our *multiple identities recognized* [italics added]" (p. 20). As an empirical study, this

research will add to scholarly debates, as it shows that no incompatibility exists between Puerto Rican national character and American citizenship (Grupo de Investigadores Puertorriqueños, 1984). Parallel to this assertion, there cannot be conversations about Puerto Rican national identity without recognizing transnational Puerto Rican identities, due in part to Puerto Rico's relationship with the United States. This discussion becomes even more relevant now, as more than half of all Puerto Ricans reside in the continental U.S. (Duany, 2002b; Krogstad, 2016; U.S. Census Bureau, 2015).

### **Significance of the Study**

My experience with Mr. Santos and his views on Puerto Rican identity reveal the possibility of students being taught in a manner that:

- recreates the banking education model (Freire, 2000);
- fails to seek a resolution to the difficulty of living in a pluralistic society (Parker, 2002);
- imposes a homogeneous view of Puerto Rican identity, and;
- dismisses the literature that suggests a novel continuum in understanding identity as a contextual construct (Barrett, 2000, 2007).

Working within the framework of anti-oppressive and social justice education, I will present what teachers taught about national identity, how students feel about the class, and how teachers perceive Puerto Rican identity.

McLaren (1995) has argued that education would not be engaged with its liberatory aspiration if any expression of sociopolitical identity becomes censored. Likewise, Kumashiro (2000) argues that when an identity is marginalized, education systems become oppressive. Thus privileging particular discourses of Puerto Rican

identity in social studies classes in Puerto Rico becomes a social justice issue in education. The issue of social justice becomes even more pronounced if educators use their power as teachers to silence particular ideologies or privilege particular discourses in their classrooms (Delpit, 1988). Granted, teachers insert their voice in the delivery of social studies classes and the curriculum. However, their voice must not suppress ideas around PRNI and PR-US relations.

Content-rich social studies classes in Puerto Rico should embrace a curricular model that enhances critical thinking skills while avoiding the dismissal of the multiple ways through which Puerto Rican identity could be understood. For example, Kincheloe & McLaren, (2005) suggest that privileging particular discourses in schools and failing to provide a comprehensive discussion of a given topic limits students' possibilities of developing critical thinking skills. In turn, Kumashiro (2002) insists on the need to "trouble" the type of education that privileges some ways of being over others. In Kumashiro's view, troubling education implores educators to look beyond curricular guidelines to ensure that their practice demonstrates liberatory ideals.

### **Research Questions**

Given the dynamics I experienced as a social studies student-teacher, it is important to define the appropriate method to analyze discourses of Puerto Rican identity in social studies classes. To address this intellectual activity, I pose the following research questions:

- What themes of Puerto Rican national identity emerge in social studies classes in PR?
- How do social studies teachers in the 7th grade deliver concepts related to PRNI?
- How important is national identity for 7th grade social studies students in Puerto

Rico?

- How do 7th grade students identify themselves in terms of national identity in PR

To address these questions, I employ a mixed-methods approach with a concurrent embedded strategy. Chapter 2 explains this strategy.

### **Delimitations**

Participants of this study were selected from two municipalities of central PR. These locations represented a local, rather than a nation-wide, spectrum for this study. Though my findings may not apply to the general population, the results of this research will show a more conceptual claim regarding the privileging of discourses of Puerto Rican identity in social studies classrooms. Due to time and monetary considerations, only two schools were selected for this project. Selecting more than two schools could result in an unmanageable project. In addition, a college of liberal arts is located near one of the research sites. I used its comprehensive library, with its collection of Puerto Rican literature and a research institute, to reflect once I completed the research activities. Finally, this project is limited to the observation of the 7<sup>th</sup> grade level due to several reasons:

- it is at the 7<sup>th</sup> grade level where the study of Puerto Rican identity assumes a historical perspective appropriate to the student's developmental level;
- after six years of instruction at the elementary level, students have a certified social studies teacher for the first time; and
- developmentally speaking, it is at the middle school level when adolescents start to struggle with their self-identity.

Although I do not intend to dismiss the value of a similar study at the elementary

levels, this research study articulates the discourses delivered to students at the 7<sup>th</sup> grade level.

### **Researcher's voice**

This project represents an opportunity for me to reflect upon identity, especially after several years of living in the continental U.S. Throughout the chapters, I intervene to add my interpretations to the events I observed, and the ideas informant shared with me. My voice is present throughout the chapters not only as a researcher, but also as Puerto Rican. I present the findings of this research study with the academic rigor typical of a doctoral dissertation. However, my feelings and sentiments remain present within the narrative. Far from diminishing the value of writing in the third person to tell my story, they enrich the discussion and add a personality to the concept of Puerto Rican identity that I aspire to preserve.

## CHAPTER TWO

### REVIEW OF RELATED LITERATURE

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*Puertorriqueñidad* [Puerto Rican-ness] refers to the sociocultural attributes and thought processes of Puerto Ricans that serve as a badge of pride and identity carried out in response to five centuries of repression, first by Spain and then by the United States.

-Amílcar Antonio Barreto

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It is only in the eyes of another culture that foreign culture reveals itself fully and profoundly... A meaning only reveals its depth once it has encountered and come into contact with another foreign meaning: they engage in a kind of dialogue, which surmounts the closeness and one-sidedness of these particular meanings, these cultures.

-Mikhail Bakhtin, 1986, p. 7

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This chapter provides an overview of related literature around the following central question: What impact do social studies teachers' practices have on Puerto Rican 7<sup>th</sup> grade students' understanding of national identity? I will approach the literature employing a thematic approach (Roberts, 2010) where the researcher reviews "themes, topics, important concepts, or major issues" (p. 103). Three major themes emerge from the literature: (a) PR's historical background; (b) PR's national identity (PRNI); and, (c) epistemological foundations of identity.

This approach allows me to analyze emerging variables across the selected literature to pose the research problem in a cohesive fashion.

Regarding PR's historical background, I include an outline of the historical development of Puerto Rico as a colonized territory. This reference allow me to elaborate on how different institutions have managed who Puerto Ricans are or should be regarding

national identity. Secondly, I describe PRNI to identify how scholars have thought about Puerto Rican-ness and its features. Third, I provide an overview of the historical background of education in PR. In regards to identity, selected sources on identity development argue that identity as a construct depends upon social and cultural contexts. Finally, I will elaborate on diverse teaching practices and instructional methods that serve as a pedagogical context in the delivery of social studies classes in PR.

With these themes, the literature review will be used to study the delivery of social studies classes in PR. Studying this phenomenon is pivotal to comprehend teachers' practice and students' self-identification with PRNI. Furthermore, this study provides insights into perceptions associated with PR's relationship with the United States in Puerto Rican schools. As a matter of fact, this study was conducted during an election year in which Puerto Ricans celebrated another plebiscite.

### **Puerto Rico's Historical Background**

Officially known as the Commonwealth of Puerto Rico or Estado Libre Asociado (ELA for its Spanish acronym), Puerto Rico is an island<sup>6</sup> located in the northeastern region of the Caribbean region, west of the U.S. Virgin Islands, and east of the Dominican Republic. Puerto Rico is the smallest of the Great Antilles in comparison to Cuba, Hispaniola, and Jamaica. According to most recent population estimate, the U.S. Census Bureau (2016) estimates the population of the island as 3,411,307.

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<sup>6</sup> Scholars have utilized the term "island" to refer to Puerto Rico as a synecdoche for the small archipelago that comprehends Puerto Rico, and smaller surrounding islands such as Vieques, Culebra and the rest of the smaller islands within the commonwealth jurisdiction (see Juhász-Mininberg, 2003). Additionally, Negrón-Muntaner (2005) has employed the term "the islands of Puerto Rico" in order to include cities of the United States with a large concentration of Puerto Ricans within the definition of the Puerto Rican nation. For example, Hartford, Chicago, New York City, and Orlando would be part of the Puerto Rican archipelago.



Geographically, “isla grande”<sup>7</sup> [the big island] is 100 miles in length and 35 miles wide.



*Figure 1.* National Aeronautics and Space Administration. Puerto Rico from the Space Shuttle. Retrieved from <http://gers.uprm.edu/images.html>

Puerto Rico is known for its blend of four cultural influences: Taíno, European, African, and American. The island is often referred to as *La isla del encanto*, which translates to the island of enchantment (Compañía de Turismo de Puerto Rico, n.d.). Documents from the Spanish conquest (Casas, 1971; Coll y Toste, 1893; Navarrete & Elcano, 1825) described and recorded the beautiful scenery and natural resources the Spaniards found in Borikén, as the Taíno Indians called the island (Wagenheim, 1998). Centuries later, PR’s beauty inspired internationally known Puerto Rican poet José Gautier Benítez (1960) to describe Puerto Rico as *el jardín de América* [the garden of

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<sup>7</sup> *Isla grande* is a term used by the locals to distinguish between Puerto Rico and the rest of the surrounding islands within the commonwealth jurisdiction.

America].

In his essay, *El país de cuatro pisos* [The four storied country], José Luis González (1989) makes a historical account of the development of national identity in PR. He addresses the development of a national character using the metaphor of a four storied building, arguing that national identity on the island occurs in four stages:

- First floor: The first floor is characterized by colonization and slavery, since the beginning of the 16<sup>th</sup> century to the beginning of the 19<sup>th</sup> century. In González words: “La cultura popular puertorriqueña, de carácter esencialmente antillano, nos hizo durante los primeros tres siglos de nuestra historia post-colombina, un pueblo caribeño más” (p. 22). According to González, Puerto Rico is an Afro-Caribbean nation where the first Puerto Rican was a black Puerto Rican.
- Second floor: This “floor” describes the heterogeneous composition of the population of the island by the end of the 19<sup>th</sup> century. According to González, an influx of Corsicans, Majorcans, and Catalonians, South Americans fleeing their lands due to the independence wars in the former Spanish colonies, and the subsequent invasion of the island by U.S. Navy forces provided a mix of traits that added to the construction of a unique Puerto Rican character.
- Third floor: The invasion of U. S. Navy forces and the Americanization process added ingredients to an already heterogeneous character that, according to González, rather than dematerializing Puerto Rican culture, added another layer to the formulation of PRNI in the literature. “Todo esto parecía digresión, pero no lo es: la ‘cultura nacional’ puertorriqueña a la altura del (18)98 estaba hecha de todo eso” (p. 28). In other words, despite Pedreira’s characterization of PRNI as a homogenous

construct (Pedreira, 1934) and Alonso's consolidation of the Puerto Rican character through el jíbaro (Alonso, 1967), González suggests that PRNI integrates multiple cultural traits suggesting a fluid configuration validated through all four floors.

- Fourth floor: The U.S. invasion of the island brought capitalism to the newly acquired territory, exposed colonialism further and provoked the enactment of the commonwealth. The economic expansion of the metropolis in Puerto Rico through the establishment of U.S. corporations, factories, and the promotion of American ways of being established a Puerto Rican society based on a dependence model.

These floors, or moments in history, highlight the complexity of the Puerto Rican character. Rather, PRNI could be better understood as a heterogeneous and fluid construct.

Ironically, the “garden of America” has been subjugated to the authority and control of an imperial power since the arrival of the Spanish conquistadors in 1493. Puerto Rico has experienced more than 500 years of colonial oppression, once with Spain and now as a commonwealth (Ayala & Bernabe, 2007; Picó, 1986, 2006; Trías Monge, 1999). Moreover, because of its past and current colonial condition, Fernández (1992, 1994) ironically refers to Puerto Rico as “the disenchanting island” and as the U.S. permanent possession. Similarly, Trías Monge (1999) postulates that far from being a paradise, as a colony, Puerto Rico lacks the experience of the most fundamental democratic principles. Consequently, Puerto Ricans suffer social injustice as colonial subjects immersed in a form of neocolonialism. This type of colonialism involves powerful nation-states and how their peripheral territories depend on the actions and global systems sponsored by such nations, e.g. the U.S. and other Latin American

countries (Grosfoguel, 2003). In other words, Puerto Rico could be best described as a post-colonial colony (Duany, 2002a).

### **Colonialism**

Colonialism characterizes PR's history (Berríos Martínez, 1983; Bosque Pérez & Colón Morera, 2006; López Baralt, 1999; Picó, 1986, 2006; Rosselló, 2005). Christopher Columbus landed in Puerto Rico on November 19, 1493. The island became colonized early in the 16<sup>th</sup> century. Under Spanish rule, San Juan, the current capital of the island, quickly became a military outpost and important port to Spanish imperial expansion over the American continent (Alegría, 1974; García Leduc, 2003; Picó, 1986, 2006; Scarano, 1993; Wagenheim, 1998). The Taíno Indians, the indigenous population of the island, were enslaved and subjugated to an imperial power. In his book, *History of the Indies*, Fray Bartolomé de las Casas reported that by 1516, three million Taíno Indians had perished, including the indigenous population of La Hispaniola and Borikén.

The Spanish imperial power controlled social, political, and economic affairs of the island. The Spanish way of life was imposed and Spanish industries and agriculture flourished. The island became an important strategic location; for almost three hundred years, Spain fortified San Juan with military installations. La Fortaleza, the current residence of the governor, is an example of such military influence. Spain's rivals, the English and Dutch, attacked San Juan during the 16<sup>th</sup> and 17<sup>th</sup> centuries.<sup>8</sup>, the current capital of the island, several times. The possibility of an invasion initiated the construction of the defensive walls around San Juan. For that reason, San Juan is also

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<sup>8</sup> San Juan, founded in 1521, is the current capital of the island with an estimated population of 395,000 (U.S. Census Bureau, 2010).

known as *La ciudad amurrallada* [The walled city].

Throughout the 17<sup>th</sup> century, the Spanish crown gradually abandoned PR, seeking the gold and lands of the American continent. During this time, residents of the island relied on contraband trade with other imperial powers; as a result, Puerto Rico only developed a subsistence economy. Throughout the 18<sup>th</sup> century, however, the Spanish crown implemented a series of political and economic reforms in the Americas. Known as the Bourbon Reforms, the crown consolidated political power to produce greater revenue in its colonies. Parallel to these changes, the population of the island and agricultural exports increased significantly because of freer trade. Also, the Spanish Crown reinforced PR's military importance, providing the military with better resources and equipment.

In the 19<sup>th</sup> century, on November of 1897, Puerto Rico enjoyed a brief period of autonomous government through the enactment of *La Carta Autonómica*, a document in which the Spanish Crown granted Puerto Rico a degree of autonomy regarding its political affairs. The enactment of *La Carta Autonómica* coincided with the emergence of a recognizable national identity in Puerto Rico (Acevedo Segarra, 1984; Picó, 1986). The 19<sup>th</sup> century is essential to understanding PRNI because of the appearance of particular cultural expressions attributed to the Puerto Rican character (see Puerto Rican National Identity on page 43 for further details). However, with the advent of the Spanish-Cuban-American War, on July 25<sup>th</sup>, 1898, U.S. Navy troops invaded the island of PR, marking a turning point in Puerto Rico's history. In 1899, the Treaty of Paris ended the war, and Spain surrendered the island along with Cuba, the Philippines, and Guam (Berbusse, 1966; Picó, 1986) for twenty million dollars. Puerto Rico was now a colonial possession

of the U.S. (Scarano, 1993).

### **Puerto Rico's relationship with the United States**

Following the military occupation of the island, the U.S. government established a military dictatorship. However, the Foraker Act of 1900 established a civil government on the island. The law established a republican form of government with three branches: executive, legislative, and judicial. Under this law, the president of the U.S. retained the power to appoint the governor, the Executive Council—similar to the U.S. Senate—and all the judges of the island. Under this law, only the members of the House of Representatives were Puerto Ricans. Local political leaders, dissatisfied with some of the dispositions of the Foraker Act, promoted the creation of a new organic law.

The Jones Act, enacted on March 2, 1917, changed the organization of the government. Although the president of the U.S. reserved the power to appoint the governor, members of the Senate and the House of Representatives were elected by Puerto Ricans. Moreover, all members of the legislative branch were now Puerto Ricans, and all designated department chiefs were subject to the scrutiny of the legislature. In one of its most significant dispositions, the Jones Act granted U.S. citizenship to Puerto Ricans, making them American citizens.

Years later, after transitioning from a military dictatorship to a civilian government, the enactment of Public Law 600 allowed Puerto Rico (a) to establish a constitution and (b) to elect an autonomous government to administer the internal affairs of the island. On July 25, 1952, Congress enacted the Constitution of the Commonwealth of Puerto Rico. Its enactment advanced PR's political relationship with the U.S. making it similar to that of any state of the union. However, the island remained a territorial

possession of the U.S. under the authority of Congress by virtue of the Territorial Clause of the U.S. Constitution (López Baralt, 1999; Rosselló, 2005; Trías Monge, 1997; President's Task Force on Puerto Rico's Status, 2007). This legal and jurisdictional arrangement has been subject to critique and profound intellectual and political debates, both on the island and the mainland (Ramos de Santiago, 1979). Contributors to the field of Puerto Rican studies (Berríos Martínez, 1983; Burnett, 2007; García-Passalacqua, 1994; Grupo de Investigadores Puertorriqueños, 1984; Rosselló, 2005) contend that the creation of the commonwealth status, in turn, did not end debates regarding Puerto Rico's colonial condition.

**Americanization.** The Americanization process represents the idiosyncrasy of the Puerto Rican character. In his book, Joel Spring (2010) cites Aida Negrón de Montilla (1970), *Americanization in Puerto Rico and the Public School System, 1900-1930*, describing the Americanization process in PR. Negrón de Montilla argued that governmental and educational policies aimed to turn Puerto Ricans into Americans. She described how Puerto Ricans resisted instruction in English and deculturation (Spring, 2010).

Negrón de Montilla (1970) examined the educational policies adopted by the public school system in Puerto Rico from 1900 to 1930. In her study, she defined Americanization as: “the process by which people of alien culture acquire American ways, standards of living, and national allegiance; or the assimilation of American culture by people of foreign birth or heritage” (Fairchild, 1944, p. 10). At the time, the public school system in Puerto Rico was controlled by American officials with a specific agenda: the Americanization of the island. Puerto Rico, a Spanish-speaking country with

its own sense of cultural and national identity, was subject to the enforcement of several educational policies to assimilate the population to American ways of being (Spring, 2010).<sup>9</sup> For example, Puerto Ricans (a) were required to celebrate U.S. holidays and festivities; (b) forced to pledge allegiance to the flag in schools and recognize American symbols; (c) obligated to study textbooks that portrayed Puerto Rican culture as uncivilized and American culture as superior; and (d) forced to use English as the language of instruction. During these decades, the government expelled Puerto Rican teachers from schools and replaced them with American teachers to promote allegiance to the imperial power. Teachers protested these policies and developed an anti-American discourse in response to the Americanization process. The Americanization policies represented an offensive effort to replace PRNI with a different identity. As José Manuel Navarro (2002) put it, the U.S. aspired to turn Puerto Ricans into “tropical Yankees.”

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<sup>9</sup> In his reference to the case of Puerto Rico, Spring (2010) calls “deculturation” the process of oppressive acculturation.





*Figure 2.* Jack Delano, 1946. Pledging allegiance to the flag in a school in Puerto Rico, Minneapolis Institute of Arts.

These policies still impact the island, fueling internal and external debates on PRNI and its current relationship with Americans. Puerto Rico's national identity is still under intellectual and political scrutiny by individuals on both the island and the continental U.S. Puerto Ricans still struggle with issues of identity, because they relate to the island's political future as a state, independent nation, or commonwealth. This political struggle has turned discussions of national identity into a sensitive topic, subject to multiple interpretations saturated with political ideologies. In other words, national identity is linked to the political status of the island (Negrón-Muntaner, 2007).

The case of Puerto Rico represents an ideal context to explore further definitions of nationhood and the role of educational institutions in promoting such definitions. Similar to many countries in Europe, national identity could be best described as a contextual construct (Barrett, 2000, 2007). Political ideology and the political status of the island are elements linked to PRNI, and for the purpose of this study, it is appropriate to pay attention to the current commonwealth status issue.

**The commonwealth and the status issue.** Many scholars have discussed the nature of the relationship between Puerto Rico and the United States. Scholars have employed multiple lenses through which to examine this relationship: (a) legally (Rivera-Ramos, 2001; Trias-Monje, 1997), (b) educationally (López Yustos, 2006; Navarro, 2002; Negrón de Montilla, 1970; Osuna, 1972) (c) racially (Godreau, 1999, 2002; Landale & Oropesa, 2002) and (d) historically (López-Baralt, 1999; Gonzalez, 1990; Picó, 2006; Scarano, 1993, 1994). Thus the discussion of Puerto Rico's political status is not a new topic in the academic world. Neither it is unknown to the public, on both the island and mainland (Ayala & Bernabe, 2007). PRNI is unequivocally linked to Puerto Rico's current political status, and the possible alternatives to the commonwealth: statehood, independence, and more recently, the associated republic (Burnett, 2007; Juhász-Mininberg, 2005; Negrón-Muntaner, 2007). As Sánchez (2008) states:

The U.S. government not only took over the island's government, but its power and influence also reached matters of education, health, infrastructure, and economy. This situation added a new layer to the national identity of the island (González 1998), new elements and complexity for Puerto Ricans to pick from when trying to make sense of themselves. (p. 41-42)

Efforts to define more concisely the commonwealth status have been recently proposed (H.R. 2499, 2010; H.R. 727, 2015; H.R. 260, 2017). A constitutional assembly and plebiscites have been suggested to resolve questions of Puerto Rico's status (Mari Bras, 1986). A topic intriguing Puerto Rican scholars, PRNI cannot be detached from Puerto Rico's experience as a colony. Moreover, under the current commonwealth status the discussion continues (Duany, 2002a, 2002b; González, 2007; Grosfoguel, 2003; Juhász-Mininberg, 2003, 2005; Pabón, 1995; Rivera Ramos, 2001; Thomas, 2010).

**Is Puerto Rico a colony?** Although Puerto Ricans are U.S. citizens, residents of the island do not possess the same responsibilities, nor enjoy the same privileges and guarantees of their counterparts on the mainland in terms of taxation, congressional representation and voting rights (Fernandez, 1994; Rosselló, 2005; Thomas, 2010). As the island remains under the Territorial Clause of the U.S. Constitution, the issue of equal rights for those living on the island remains neglected. Congress holds Puerto Rico's sovereignty and treats the island as a territorial possession (Berbusse, 1966; López Baralt, 1999; Puerto Rico, 1953; Rivera Ramos, 2001; Trías Monge, 1997; President's Task Force on Puerto Rico's Status, 2007). Constitutional statutes restrict the residents of Puerto Rico from voting for the president of the U.S., selecting two senators to the U.S. Senate, or electing the corresponding number of representatives to the House. Additionally, control over commercial imports and exports, customs, and international commerce resides within the authority of Congress. Although the commonwealth constitution brought democratic advancements to the island, Puerto Rico is indeed a colony, a territorial possession (González-Cruz, 1998).

According to the island's former Governor, Pedro Roselló, Puerto Rico is seen as

a colony because its commonwealth status implies the subjugation of the Puerto Rican people to the plenary powers of Congress (Rosselló, 2005). In an effort to shed light on PR's political status, the U.S. Department of Justice released a report in 2007, "Report by the President's Task Force on Puerto Rico's Status" (2007) that confirms the previous assertion:

When "commonwealth" is used to describe the substantial political autonomy enjoyed by Puerto Rico, the term appropriately captures Puerto Rico's special relationship with the United States. The commonwealth system does not, however, describe a *legal* status different from Puerto Rico's constitutional status as a 'territory' subject to Congress's plenary authority under the Territor[ial] *sic* Clause". (p. 5)

The Territorial Clause of the U.S. Constitution stipulates that Congress has:

...the power to dispose of and make all needful Rules and Regulations respecting the Territory or other Property belonging to the United States; and nothing in this Constitution shall be so construed as to Prejudice any Claims of the United States, or of any particular State. (US Const. art. 4, § 3)

The Insular Cases provided legal statutes that describe Puerto Rico as a territorial possession rather than a part of the United States.<sup>10</sup> Furthermore, the report indicates that:

Congress may continue the current commonwealth system indefinitely, but it necessarily retains the constitutional authority to revise or revoke the powers of

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<sup>10</sup> A series of US Supreme Court cases following the Spanish-American War where the newly acquired territories where the newly acquired territories were declared possessions (property) of the United States, meaning that the territories belonged, but were by no means part of the United States (Trías Monge, 1997).

self-government currently exercised by the government of Puerto Rico. Thus, while the [C]ommonwealth [*sic*] of Puerto Rico enjoys significant political autonomy, it is important to recognize that, as long as Puerto Rico remains a territory, its system is subject to revision by congress. (p. 6)

The former governor, considered one of the major pro-statehood figures of the island, claims that democracy can be best fully extended to Puerto Ricans through the full incorporation of Puerto Rico as a state. If Puerto Rico becomes a state, the citizens of the island will resolve the issue of equal rights. However, if a colonial status remains in situ, democracy cannot attain full meaning on both the island and the mainland. Thus, Puerto Rico is to be considered a colony of the U.S. since the commonwealth status did not provide a permanent solution to the long-lasting issue of Puerto Rico's relationship with the United States (Rosselló, 2005).

**Solving the status issue.** Resolving the status issue is a task long overdue (Burnett, 2007). "Formal decolonization for Puerto Rico," Christina D. Burnett argues, "has been postponed for centuries" (p. 77). She challenges historian Carlos Pabón (2007) who has suggested that adopting political formulas such as independence, statehood, or free association will not resolve contemporary problems in Puerto Rico. Pabón suggests that choosing independence, for example, will not solve low literacy levels, drug trafficking, and pollution on the island. Instead, he argues that the above problems would be best addressed by putting the status issue aside. Pabón problematizes independence, statehood, and the free association options as he discusses what he calls the "crisis of the

nation-state.”<sup>11</sup> Burnett’s response to such argument is simple, yet rational: “All that a status option can do is solve the status problem” (p. 76). Indeed, I concur with Burnett when she suggests that “the moment for formal decolonization of Puerto Rico is right now, and always has been” (p. 77). Consequently, allowing voters to express their status preference as many times as necessary should not be considered unreasonable, as Pabón suggests.

To this date, Puerto Ricans have celebrated four plebiscites in an attempt to solve the status issue. The traditional political parties of the island, the Partido Nuevo Progresista (PNP), the Partido Popular Democrático (PPD) and the Partido Independentista Puertorriqueño (PIP), each support a political ideology. The PNP supports statehood, PPD supports the commonwealth status, and PIP advocates for independence. The political atmosphere of the island, as well as the political system, spins around the status issue. Furthermore, these political parties have promoted their interpretations of the Puerto Rican character (Sánchez, 2008) and have connected the political status to a way of being Puerto Rican.

Thus four plebiscites have been celebrated since the enactment of the commonwealth, in 1967, 1993, 1998, and more recently, in 2012 (see Table 1, *Results of Plebiscites Celebrated in Puerto Rico*, for the electoral results of each plebiscite).<sup>12</sup> In 1967, the commonwealth obtained a clear majority of votes. In 1993, twenty-six years

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<sup>11</sup> In his essay, Pabón argues that the proposed solutions for Puerto Rico’s political status are based on outdated configurations of the nation-state and sovereignty. He argues that current nation-states are in crisis because they are constituted based upon a 19<sup>th</sup> century vision that no longer responds to the emerging needs of the 21<sup>st</sup> century. Within this paradigms, Pabón suggest that the status issue would be best addressed: “imagining new forms of post-national communities that are not founded upon being native to a territory or ethnic affiliation or belonging to a state” (Pabón, 2007, p. 70).

<sup>12</sup> Data obtained from Comisión Estatal de Elecciones, Puerto Rico’s Electoral Commission

later and with the pro-statehood party in power, a second plebiscite was celebrated. Once again, voters favored the commonwealth status. However, statehood increased its popularity receiving 46% of the vote. In 1998, a third plebiscite was celebrated with the addition of new options to the ballot. The PNP opposed the addition of the new options and after several court appeals, Puerto Rico’s Supreme Court ordered the addition of Free Association and None of the Above to the ballot. The former received no support, and the latter obtained the majority of the votes (50.3%). Statehood maintained a steady 46% of the cast votes.

Table 1

*Results of Plebiscites Celebrated in Puerto Rico, Comisión Estatal de Elecciones.*

Year	Commonwealth	Statehood	Independence	Free Association <sup>13</sup>	None of the Above <sup>14</sup>
1967	60.4	39	.6		
1993	48.6	46.3	4.4		
1998	0.1	46.5	2.5	0.3	50.3

**A new beginning.** In the summer of 2011, former Governor Luis Fortuño announced the celebration of a two question plebiscite, asking voters whether to maintain or change the current commonwealth status. The original design of the plebiscite

<sup>13</sup> Free association as a status option was first introduced to the ballot in 1998 as a political status validated by International Law as a non-colonial form of government (see Resolution 1541 (XV) Principle VI United Nations General Assembly for further details).

<sup>14</sup> On a surprising vote, Puerto Ricans favored “None of the Above”. Some political observers have been postulating that the vote was a as an expression of repudiation against public policies adopted by then-governor, Pedro Rosselló. The political opposition, the Popular Democratic Party, called for a “voto castigo”—a punishing vote against the governor and the New Progressive Party who remained in power from 1993 to 2000. Others have stipulated that the vote was an expression on how Puerto Ricans see themselves as people with little interest on conventional nation-state configurations. For a more comprehensive understanding of this historical event, see Negrón-Muntaner, 2007.

mandated a second referendum in the event voters would defeat the current commonwealth. The ballot of the second referendum included four status options: “enhanced” commonwealth, statehood, free association, and independence.<sup>15</sup> In fact, *El Nuevo Día*, a major newspaper on the island, reported poll results that showed statehood as the most popular option among voters (see Table 2 for a 2011 survey on Puerto Rican voters’ preference regarding Puerto Rico’s status). The newspaper indicated a notable trend supporting statehood in similar polls since 2003 (“Con ventaja la estadidad,” 2011). Since the enactment of the commonwealth, statehood has gained popularity.

Table 2

*Poll On The Political Status Options In 2011. El Nuevo Día.*

Statehood	ELA (Commonwealth)	Independence	Will not vote	Do not know	Did not answer
43%	39%	7%	4%	3%	4%

The final version of the Act authorizing the plebiscite suffered a significant amendment. The legislature configured the ballot in such manner that it asked voters the following questions: “Do you agree that Puerto Rico should continue to have its present form of territorial status?” The voter needed to respond yes or no. Regardless of the voter’s choice in the first question, a second question followed: “Please mark which of the following non-territorial options you would prefer.” The options were listed in the

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<sup>15</sup> Enhanced commonwealth refers to a status option where Puerto Rico will no longer be under the Territorial Clause of the U.S. Constitution, retains its sovereignty and Puerto Ricans remain U.S. citizens. Pro-commonwealth supporters, such as former Governor Acevedo Vilá have proposed the enhanced commonwealth as alternative to the current colonial status. However, the U.S. Department of Justice has described the enhanced commonwealth as unconstitutional.



following order: statehood, independence, or Sovereign Free Associated State (See Appendix L for a model of the ballot). Each option was defined as follows:

- Statehood: Puerto Rico should be admitted as a state of the United States of America so that all United States citizens residing in Puerto Rico may have rights, benefits, and responsibilities equal to those enjoyed by all other citizens of the states of the Union, and be entitled to full representation in Congress and to participate in the Presidential elections, and the United States Congress would be required to pass any necessary legislation to begin the transition to statehood.
- Independence: Puerto Rico should become a sovereign nation, fully independent from the United States and the United States Congress would be required to pass any necessary legislation to begin the transition into the independent nation of Puerto Rico
- Sovereign Free Associated State: Puerto Rico should adopt a status outside of the Territory Clause of the Constitution of the United States that recognizes the sovereignty of the People of Puerto Rico. The Sovereign Free Associated State would be based on a free and voluntary political association, the specific terms of which shall be agreed upon between the United States and Puerto Rico as sovereign nations. Such agreement would provide the scope of the jurisdictional powers that the People of Puerto Rico agree to confer to the United States and retain all other jurisdictional powers and authorities.

The plebiscite was celebrated on Election Day, November 3, 2012. A total of 1,798,987 registered voters cast ballots, a 78.2% participation rate. Forty-six percent (46%) of the electorate, totaling 828,077, voted YES, expressing support for the current

commonwealth status. However, for the first time in Puerto Rican history, the People of Puerto Rico voted NO and defeated the current territorial and colonial condition with 53% of voters rejecting the current territorial status, and therefore, withdrawing the consent to remain under the Territorial Clause of the U.S. Constitution. “Ganó el no, ganó la dignidad!” [The no vote won, dignity won], pro-statehood Governor Fortuño said.

The people not only rejected the commonwealth status, but also for the first time since the enactment of the commonwealth, statehood received the majority of the votes in the second question. A total of 1,363,854 registered voters voted in the second section of the two part ballot. Surprisingly, 61.16% of the electorate chose statehood over the non-territorial options. The Sovereign Free Associated State received less support, only 33.34% of the votes. Independence reached 6% of the votes.

As discussions about the plebiscites and political campaigns initiated, PRNI has caught once again significant attention among the Puerto Rican people, both on the mainland and on the island. Just recently, U.S. Rep. Luis Gutiérrez, Democrat from Illinois, has suggested that Puerto Ricans in the U.S. should have had the right to vote in the plebiscite. Gutiérrez, of Puerto Rican heritage, has suggested on many occasions that the Puerto Rican diaspora should be taken into account when deciding Puerto Rico’s political future. He argues that the people of the Puerto Rican diaspora are as Puerto Rican as those living on the island. According to the congressman, the government of the island should have allowed them to vote. However, at the heart of Gutiérrez’s argument is the contention that the plebiscite’s result will impact PRNI. On a recent CNN report on PR’s political future, before the plebiscite, Gutiérrez described Puerto Rico as a Spanish-speaking country, implying that statehood would erode PRNI and culture.

However, concerns about the impact of statehood on PRNI misrepresents the recent and rapid demographic changes taking place on the island and the mainland. According to the 2010 U.S. Census Bureau, Puerto Ricans represent the second largest Hispanic group in the U.S., and yet “no todos los boricuas hablan español, no todos les gusta el arroz con habichuelas, no todos son católicos” (Toro, 2011, para. 11). Additionally, Puerto Ricans have demonstrated a strong sense of cultural identity as a Hispanic minority in the U.S. (Flores, 1993; Juhász-Mininberg, 2003). Thus, PRNI continues to be linked to the status issue, and as such, remains an unresolved matter as long as Congress does not take action. Puerto Ricans want the status issue resolved and have adopted statehood as their solution.

**Economic crisis and fiscal abyss.** For two decades, the government of Puerto Rico has been irresponsibly borrowing money and selling bonds to keep the state government running. The Federal Reserve Bank, Moody's Investors Service, and Standard & Poor's, have predicted that Puerto Rico will default on its obligations and face possible bankruptcy (Commerce, 2015; Gillers & Timiraos, 2016; "Puerto Rico government shuts down," 2006; Rivera, 2006a, 2006b). The island will soon run out of money. In 2006, the government of Puerto Rico closed down in the middle of a fiscal crisis in an apparent deficit of 750 million dollars. The then pro-commonwealth Governor, Aníbal Acevedo Vilá, requested the pro-statehood legislature to pass a new sales tax to allow the government to issue new debt. The sales tax revenue would serve as collateral for this new debt. However, the executive and legislative branches disagreed over the percentage of the new tax. The executive branch wanted to impose a 7% sales tax, but the legislature advocated for a 5.5% tax instead. The disagreement caused the

state government to shut down for several days.

After many attempts to reach a consensus, the senate and the house approved the governor's proposal, and the state government reopened. In a political move, the Speaker of the House, Representative José Aponte, claimed that the majority of House members misunderstood Governor Acevedo Vilá's proposal and mistakenly approved the 7% tax. The tax issue remains one of the major political conflicts in the history of the island. Although the government reopened, the approval of the sales tax did not solve the economic crisis.

In 2008, Luis G. Fortuño, a pro-statehood and Republican candidate, defeated Governor Acevedo Vilá. Governor Fortuño took office in 2008 after serving in Congress as Resident Commissioner for four years. Despite winning the elections by a large margin, with both the Senate and the House, Governor Fortuño quickly lost popularity after the approval of Public Law 7. The law declared a fiscal emergency, dismissing close to 30,000 public employees to cut government spending. The measure caused major protests and social instability, despite improving Puerto Rico's bond ratings. Fortuño's term in office brought many federal funds to the island through the grants of the American Recovery and Reinvestment Act of 2009. During his tenure as governor, the island received close to seven billion dollars between fiscal years 2008-09 to 2012-13. The federal money aided the island's fragile finances, but despite the injection of funds, close to 3.4 billion dollars were used for government operations and did not have any impact on the economy.

**The end of the Commonwealth of Puerto Rico.** Benjamín Torres Gotay (2016), a well-known Puerto Rican reporter, recently published a column in *El Nuevo Día*, a local

newspaper, which highlights the defeat of several notions associated with the commonwealth status. In his column, *The End of the Old Promise*, Torres Gotay describes that the commonwealth status is close to an end, given a specific set of circumstances that have severed the commonwealth sovereignty. Commonwealth supporters have sustained for many years that with the enactment of the Estado Libre Asociado [Commonwealth of Puerto Rico] in 1952, the island “had reached enough of a degree of self-governance so as to stop being considered a colony” (para. 2). However, the commonwealth and its presumed sovereignty have ended because:

- the people of Puerto Rico rejected the commonwealth status in 2012, and the celebration of a new plebiscite promises the redefinition of the political status of the island;
- the U.S. Supreme Court, in *Puerto Rico v. Sánchez Valle*, (2016) demonstrated that the commonwealth’s authority originates from Congress, and;
- the enactment of Public Law 114-187: Puerto Rico Oversight, Management, and Economic Stability Act, which provides the creation of an oversight board with authority, even over elected officials.

*New plebiscite: Puerto Rico Immediate Decolonization Act of 2017.* Given the results of the plebiscite celebrated in 2012, when 54% of voters rejected the current commonwealth status and 62% opted for statehood, Puerto Ricans will have a chance to ratify these results and end the territorial condition. During the 2016 gubernatorial campaign, the then-candidate Ricardo A. Rosselló promised the celebration of a new plebiscite that will ratify the results of the 2012 plebiscite. When he was sworn into office in 2017, the pro-statehood governor and son of former Governor Pedro Rosselló (1993-

2000), signed into law the *Puerto Rico Immediate Decolonization Act of 2017*. The law provides for the celebration of a new plebiscite in June of 2017, when Puerto Ricans will vote between statehood and independence.

On this occasion, however, Puerto Ricans will have two options on the ballot: statehood or independence (see Appendix M for a model of the ballot). When he signed the bill into law, Governor Ricardo Rosselló stated: “When statehood wins, a ratification of the 2012 result will be set in motion, and that will drive us towards using new instruments to go to the federal capital and demand the beginning of a decolonization process” (Rosselló Nevares, as cited in Colón Dávila, 2017, para. 11). Essentially, if statehood wins, it means that Puerto Ricans want to end the current commonwealth status and aspire to become a state of the union. If independence wins, a second round will be celebrated in October, when Puerto Ricans will choose between full independence and free association. The 2012 plebiscite demonstrates that statehood has gained support on the island. Whether the 2012 plebiscite was as an accurate representation of the island’s allegiance to the U.S., voters defeated the commonwealth. Puerto Ricans rejected the territorial status, withdrew their consent for Public Law 600, and expressed their desire to solve the status issue.

*Puerto Rico v. Sánchez Valle*. The U.S. Supreme Court heard an important case that, among other things, unveiled that Puerto Rico is not a sovereign entity. In a criminal case involving the jurisdiction of the federal court and Puerto Rican state law, the U.S. Supreme Court determined that an individual: “could not be indicted twice for the same offenses by the same sovereign entity, and because Puerto Rico and the United States both derive their authority from the United States Constitution, they are the same

sovereign entity” (*Puerto Rico v. Sánchez Valle*, 2016, para. 5). This case highlights that the ultimate authority of the commonwealth, even for the purpose of prosecuting citizens, emanates directly from the U.S. Congress and not from the commonwealth’s constitution. The majority opinion of Supreme Court Justice Elena Kagan highlights the implications of the case:

Put simply, Congress conferred the authority to create the Puerto Rico Constitution, which in turn confers the authority to bring criminal charges. That makes Congress the original source of power for Puerto Rico’s prosecutors— as it is for the Federal Government’s. The island’s Constitution, significant though it is, does not break the chain. (*Puerto Rico v. Sánchez Valle*, 2016, p. 3)

This case unmasked the territorial condition of the commonwealth status, as it highlights the territory’s inability to exercise its “so-called sovereignty” under certain circumstances. Thus the ruling suggests that “[the] last source of sovereignty in Puerto Rico isn't here, but rather in Congress” (Torres-Gotay, 2016, para. 2). This statement represents a solid argument in favor of Puerto Rico’s colonial condition as it relates to “Congress conferring the authority to create the Puerto Rico Constitution” (Torres Gotay, 2016, para. 11). After more than fifty years trusting that the enactment of the Estado Libre Asociado granted Puerto Rico some level of sovereignty, the imperial power crumbled that illusion with a Supreme Court decision. In sum, this case unveiled the true nature of the commonwealth status: Puerto Rico remains a colony under the authority of Congress.

***PROMESA: An oversight board.*** Surprisingly, the same day the U.S. Supreme Court decided *Puerto Rico v. Sánchez Valle*, Congress approved “the creation of an

Oversight Board whose powers supersede those of the government elected by Puerto Ricans, regarding the preparation of budgets, approval of laws, and the granting of contracts.” (Torres Gotay, 2016, para 3). In other words, given Puerto Rico’s fiscal crisis, the government of the U.S. decided to place Puerto Rico under the authority of an entity created by Congress to supervise the island’s budget. This action, once again, highlights Puerto Rico’s lack of sovereignty and exemplifies the plenary powers of the U.S. over the territory.

Once signed into law, President Obama named the members of the Puerto Rico Fiscal Agency and Financial Advisory Authority (FAFAA). The president nominated seven members to *La Junta* [the Board], five of which are of Puerto Rican heritage. The board assesses Puerto Rico’s financial crisis and executes a fiscal plan that incorporates budget cuts, debt payments, and the balance of government revenue and expenditures. As of March of 2017, the government of Puerto Rico proposed a fiscal plan to the Board, but some experts suggest that Governor Roselló’s plan will fail to rehabilitate the island, given the severity of the crisis. Joseph Stiglitz (2017), Nobel Prize winner in Economic Sciences, suggested that Puerto Rico is experiencing an abysmal crisis:

...the island’s recession [will turn into] a depression, of a magnitude seldom seen around the world—a decline of 16.2 percent of gross national product in the next fiscal year, comparable to the experience of countries in civil wars, and Venezuela in economics crisis in 2016. Unemployment, already at 12.4 percent, would soar. (Stiglitz, 2017, para. 2)

At this point, fiscal measures are an uncertainty, but the power of *la junta* is not.

As Torres states:



[T]he creation of an Oversight Board whose powers supersede those of the government elected by Puerto Ricans, regarding the preparation of budgets, approval of laws, and the granting of contracts. The government of Puerto Rico continues having these powers, but they can only be exercised with the Board's approval. (Torres Gotay, 2016, para. 3)

In March 2017, the Board will decide the fate of the government's plan. If the plan is rejected, the Board will enact a fiscal plan with little or no consent from the people of Puerto Rico.

### **Puerto Rican National Identity**

Colonialism, directly or indirectly, has provoked complex dialogues on Puerto Rican identity (Grosfoguel, 2003; Rivera Ramos, 2001). As Sánchez (2008) described it: "The ambiguous nature of the Commonwealth of Puerto Rico has led to questions concerning the existence of a Puerto Rican nation, and therefore, to different interpretations of Puerto Rican-ness" (p. 45). Consequently, Puerto Rico's relationship with the U.S. has shaped the configuration and the meanings available to interpret PRNI.

After more than five hundred years of colonial oppression, defining Puerto Rican identity remains at the heart of many Puerto Ricans. Historians, anthropologists, politicians, religious leaders, próseres,<sup>16</sup> patriots, artists, musicians and everyday citizens, all possess unique ways to portray and represent Puerto Rican-ness on a daily basis (Barreto, 2001). PRNI is under constant scrutiny and public discussion. As I continued to migrate between the island and the mainland to work on this study, I realized that

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<sup>16</sup> They are highly valued historical figures or citizens that remain in high esteem in the hearts of the Puerto Rican people.

newspapers constantly report on events related to national identity. The evening news and TV shows reflected discussions on PRNI. As of November 2011, several instances illustrate Puerto Rican debates on issues of national identity.

For example, in the most popular TV show on the island, the selection of the Puerto Rican representative to the Miss Universe contest was criticized. On an episode of “La Comay,” Puerto Rican TV producer, Antulio “Kobo” Santarosa, expressed frustration about the Puerto Rican candidate for the Miss Universe contest. In his view, Miss Puerto Rico 2012 was not Puerto Rican. She was not born on the island and her parents have no Puerto Rican heritage. “¿Cómo vamos a enviar a alguien que no es puertorriqueña a representar a nuestra isla?” [How is it possible that we going to send someone who is not Puerto Rican to represent our island?], La Comay said. A few days later, newspapers and TV shows reported on La Comay’s allegations. Finally, Miss Puerto Rico Universe 2012, Bodine Koehler Peña, released a statement indicating that, although she was born in the Netherlands and her parents are from Dominican and Dutch descent, she grew up in Puerto Rico and feels 100% Puerto Rican.

Similarly, in a recent newspaper article, reporter Ana Teresa Toro (2011) writes about what it means to be Puerto Rican. In her article, she acknowledges how being Puerto Rican today differs from Manuel Alonso’s “jíbaro,” the iconic Puerto Rican peasant of the nineteenth century. She suggests that, “cultura e identidad ya no funcionan en singular, hablamos de culturas e identidades” [culture and identity no longer function in singular terms, we talk of cultures and identities] (Toro, 2011, para. 3). This idea replicates the notion of multiple Puerto Rican identities (Pabón, 2002).

Finally, in a recent hearing of Puerto Rico’s House of Representatives, former

Governor Carlos Romero Barceló suggested that the 2012 plebiscite include a question related not only to citizenship, but also to national identity. Barceló explained during the hearing that Puerto Ricans need to answer a simple question: whether they want the same rights, privileges, and obligations of their fellow citizens on the mainland. Although the issue focuses on American citizenship, the exercise could potentially address issues of cultural and political nature. For example, the answers to the questions would show how people negotiate both their Puerto Rican self-identification and American citizenship. According to the former governor, Puerto Rican people need to answer those questions to reaffirm allegiance to the U.S. and to safeguard PRNI ("De luto el ELA," 2011).

These examples show how Puerto Rican-ness is a construct under constant scrutiny on both the island and the mainland. For the purpose of this study, I sympathize with the argument that national identity in Puerto Rico cannot be conceived as a static, singular construct. Rather, multiple Puerto Rican identities converge in a constant flow and negotiation of meaning. As Duany (2002b) suggests, essentialist and contemporary views on PRNI exist. Contemporary views on PRNI transcend the essentialist nation-state paradigm where national identity is understood within the borders of a state, language, and folklore. PRNI is not reserved for individuals who fulfill essentialist notions of identity. Rather, contemporary views on PRNI suggest individuals negotiating its meaning at many levels (Erikson, 1968; Goffman, 1956; Holland, Lachicotte Jr., Skinner, & Cain, 2001; Sokol, 2009).

**PRNI: A dynamic construct.** Anthropologist Jorge Duany (2002b), describes Puerto Ricans and Puerto Rico as a nation on the move. For example, Esmeralda Santiago (1994) narrates an acclaimed story about the process of discovering her own identity as a

Puerto Rican while leaving rural Puerto Rico to move to the U.S. Santiago describes the experience of moving from Puerto Rico to *el barrio* [the hood] in New York as tumultuous process where she had to learn new ways of being and negotiate between Puerto Rican and American culture. It would be difficult to understand being Puerto Rican as a non-changing, non-malleable identity restricted geographically to the boundaries of the island surrounded by sea. Moreover, Duany argues that academics need to be dialogical about Puerto Rican identity to comprehend Puerto Rico's multiple sociocultural realities, on the island, the mainland, and worldwide. In this context, the term dialogical implies the following:

The notion of a personal life we are entitled and responsible to develop and the opportunity to explore alternatives to selves with diverse lifestyles creates a perpetual *self-constructionist dialog* [italics added] and a necessity to legitimize our actions by convincing ourselves as well as others about the assertiveness of our self-made identities. (Vargas Frenk, 2011, p. 21)

Similarly, Pabón (2002) argues that understanding Puerto Rican identity requires acknowledging a cultural pluralism typical of post-modern nations. As Rivera Ramos (2001) asserts: "the formation of identities in Puerto Rican society is a very complex process involving multiple determinations [or models]" (p. 170). This cultural pluralism discourages people from understanding Puerto Rican identity as a single static unit (Pabón, 2002). In turn, the current historical moment calls for the acknowledgment of what Pabón describes as multiple Puerto Rican identities or discourses of Puerto Rican identity.

Puerto Rico's colonial trajectory shows the difficulty of understanding Puerto

Rican identity in singular terms. Historians, such as Pabón, recognize the importance of discussing the origins of the Puerto Rican character and identity and how they emerged throughout the nineteenth century. During the nineteenth century, “Puerto Rican identity coalesced” (Acevedo Segarra, 1984, p. 39). The development of a Puerto Rican national identity took place while Puerto Rico remained under Spanish control. As Berbusse (1966) described:

In Puerto Rico of the nineteenth century, here political factions began to evolve: the Conservatives, who favored unconditional submission to Spain, the Liberals, who were willing to be assimilated as a province into Spain, but only upon the assurance of a great deal of local administrative autonomy; and the Separatists, who believed that Puerto Rico had arrived at a period of development that would permit them to form a sovereign political unity. (p. 10)

Although the crafting of Puerto Rican identity can be identified historically, contemporary debates regarding our current relationship with the U.S. have created the ideal conditions to explore Puerto Rican transnational identity. Pabón suggests that any attempt to control or censor definitions of Puerto Rican identity becomes an act of exclusion and oppression. Different discourses of Puerto Rican identity have been promoted within the history of Puerto Rico (Pabón, 1995, 2002). What is pivotal about national identity in Puerto Rico is the assertion of how Puerto Rico remains: “un pueblo con una identidad nacional muy fuerte, pero con pocos deseos de convertirse en estado-nación” (Pabón, 2002, p. 60).<sup>17</sup> Similarly, Duany (2002a) describes Puerto Rico as *una*

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<sup>17</sup> People with a strong sense of national identity, but with little desire to become a nation-state

*nación sin estado* or a stateless nation. Scholars debate over discourses of Puerto Rican identity, rejecting the idea of Puerto Rican identity as a mere construct driven by a stable and fixed notion of identity. Instead, as Pabón (2000) suggests, it is more appropriate to speaking about multiple Puerto Rican identities.

Discussions of Puerto Rican identity in the social studies curriculum illustrate social justice tenets and critical theories in education. Historically, the social studies curriculum in Puerto Rico has been used to promote specific ideas of Puerto Rican identity through the colonial trajectory, once with Spain and now as a commonwealth of the United States. Scrutinizing the delivery of this curriculum highlights modern forms of oppression and censorship within educational practices. Social studies educators who neglect the multiplicity of Puerto Rican identities fail to acknowledge that educational practices should reflect the country's diverse identities. Moreover, conversations about Puerto Rico's relationship with the U.S. need to recognize the existence of such identities.

### **Education in Puerto Rico**

The complex historiography of education in Puerto Rico reveals that schools are an ideal location to study the distribution of several discourses of PRNI (Cáceres, 1976; López Yustos, 2006; Osuna, 1975). School systems in Puerto Rico were used traditionally as oppressive instruments, while censoring certain discourses of Puerto Rican identity and privileging others ways of being. Negrón de Montilla (1970), Acevedo Segarra (1984), Eliza Colón (1989), and Navarro (2002) discuss how the education system of the island was used to censor different discourses of Puerto Rican identity in schools and replace them with American customs and traditions.

For instance, Negrón de Montilla documented extensively how the U.S. government “Americanized” the Puerto Rican people by neglecting and dismantling any Puerto Rican cultural trait from the school curriculum. Acevedo Segarra conducted a content analysis of the Puerto Rican history textbooks used during the twentieth century and discovered that they lacked adequate depictions of Puerto Rican nationalist and independence movements. Similarly, José Manuel Navarro analyzed Social Science textbooks from 1898 to 1908; his findings revealed the ideologies of the American imperialist agenda in Puerto Rico.

More recently, in 2011, on an official visit, former U.S. Secretary of Education Ernie Duncan visited PR. It was the first official visit of a U.S. Secretary of Education in eighteen years. In his official comments, Secretary Duncan suggested that Puerto Rican schools were too politicized, meaning that individual’s political affiliation is often times used as a criteria for the decision-making process in buildings, school districts and at the state level. Today, the problem of political ideology in the school system in Puerto Rico persists.

### **Epistemological Foundations of Identity**

The study of identity is a complex field. In her introductory chapter, Wetherell (2010) indicates that: “identity studies constitute a field of great theoretical and methodological complexity—a site of continuous unsettled argument” (p. 4) Weatherell attributes this complexity to “[t]he variety of often contradictory directions in identity studies, the heavy-duty reflexivity identity requires, scholarly unease about the significations and etymology of identity, and anxieties over definition and boundaries . . .”. (Wetherell, 2010, p. 4). Wetherell insists that three paths exist for the study of identity:

the subjective, the social, and the ethical-political paradigms. For the purpose of this research, I will use both the subjective and social paradigms to interpret children's level of identification with PRNI.

Multiple factors influence the development of identities. Nonetheless, identity has a common epistemological notion in the literature: the idea of being a kind of person (Gee, 2001). Thus according to Gee, identity has been seen within the education literature as:

A person....recognized as being a certain kind of radical feminist, homeless person, overly macho male, "yuppie," street gang member, community activist, academic, kindergarten teacher, "at risk" student, and so on and so forth, through countless possibilities. The "kind of person" one is recognized as being, at a given time and place, can change from moment to moment in the interaction, can change from context to context, and, of course, can be ambiguous or unstable. (p. 99)

This notion of identity suggests a sociocultural approach, in which identity is negotiated in a dialogical fashion. This view implies that identity is a subjective construct, localized within specific cultural contexts and experiences (Good, 2010). It is a cohesive construct that relies on the convergence of internal and external configurations.

### **Identity and education**

In education, scholars view the development of identities from multiple perspectives. Children of school age are in the constant process of identity formation. Schools are places where students have opportunities to develop identities in contrast to others. This is true, especially when "for most children and young people (*sic*) school



[more than individuals families] remains the primary arena for engaging and dealing with a whole array of differences” (Reay, 2010, p. 278). Identity, then, becomes a construct that depends on how individuals position themselves against each other. For example, while discussing sociocultural aspects of meaning and culture, Bakhtin (1986) stated that:

It is only in the eyes of *another* culture that foreign culture reveals itself fully and profoundly (but not maximally fully, because there will be cultures that see and understand even more). A meaning only reveals its depth once it has encountered and come into contact with another foreign meaning: they engage in a kind of dialogue, which surmounts the closeness and one-sidedness of these particular meanings, these cultures. (p. 7)

Children in schools engage in the process of developing an identity, an identity likely different from that of the teacher (Reay, 2010). Students identify the teacher as the “other”; the one that is not a student. Students bring a diverse set of experiences to the classroom; furthermore, teaching is not unidirectional. On the contrary, the teaching and learning process enacts a binary dynamic that acknowledges the presence of multiple identities and personal boundaries.

In that sense, teachers need to acknowledge and recognize the identities of the students and provide academic experiences that will foster such identities. My experience with the cooperating teacher as I describe it in chapter 1 is an example of how teaching becomes a political act. As Elmore (2005) suggests: “Teaching and learning is one way we negotiate our individual needs and interests. In this way, it is a quintessentially political act, a microcosm of democracy” (p. 279). The cooperating teacher attempted to impose his views on Puerto Rican identity, which potentially censored student

conjectures about PRNI. The cooperating teacher indicated that a true Puerto Rican would favor independence for the island. I strongly disagree with that statement. I have pledged allegiance to the U.S. flag and I favor statehood for the island, but I consider myself 100% Puerto Rican.

My views on Puerto Rican identity and my allegiance to the U.S. might seem paradoxical. Nevertheless, in her book, *Puerto Rico: Culture, politics and identity*, Nancy Morris (1995) presents the diverse views of elite Puerto Rican politicians on national identity. Responses to focus group interviews reveal that national identity in Puerto Rico is subjective, dependent upon political affiliation. Her work shows that the lack of identification with the U.S. increases with affiliation to the pro-commonwealth party and the independence party. Pro-statehood supporters maintained that no contradiction exists between being Puerto Rican and being American. Pro-commonwealth and pro-independence supporters expressed that being Puerto Rican is different from being American. In this context, my understanding of being 100% Puerto Rican and a U.S. citizen represents one of many views on PRNI.

### **Localized or National Identities**

Supporters of socialization theory argue that identity development depends on external forces and societal settings. Socialization, as defined by Maccoby (2007), “refers to the processes where naïve individuals are taught the skills, behavior patterns, values, and motivation needed for competent functioning in the culture in which the child is growing up” (p. 13). In this context, identity develops from the outside-in, based upon “influences from the child’s social environment, especially parents, schooling, and the mass media” (Barrett, 2000, p. 39). On the other hand, developmental psychologists, such

as Piaget, argue that identity develops according to the child's cognitive capacity to reason and understand the external world, an inside-out process (subjective-ness). Other researchers suggest the convergence of both subjective and social forces in the process of identity formation (Barrett, 2000). Within this context, students' national identity emerges in localized and regional contexts.

According to Reay (2010), identity cannot be isolated from local or national contexts, nor micro or macro contexts. She also suggests that: "school micro-politics and peer group power dynamics work to construct student identities" (p. 292). At the micro level, students interact with each other and other members of the school community, negotiating their identities regarding their differences or similarities. At the macro level, "institutional processes," Reay argues, "can elevate and centre [*sic*], or deflate and marginalize, students' sense of self" (p. 292). Schools and teachers, similar to my experience with the cooperating teacher promoting a single view of Puerto Rican identity, may define the type of learner they want to produce. However, dismissing students that do not fit such definition is problematic.

Schools privilege an *academic* form of student identity at the expense of other aspects of the self. For example, schools reproduce what Hudak (2001) called the "true self" and the "false self" in education. This dichotomy refers to how schooling forces on students a notion of the self that is congruent or not with the ability to be, for example, an ideal learner. This means that as an ideal learner, a student must create an identity or a "false self" in order to "learn and live out within the school context the social and epistemological distinctions between the organizing categories of work and play; between school knowledge and 'my' knowledge; between compliance and self-affirmation" (p.

17). The ideal learner develops a fractured and fragmented sense of self or a “false self” that complies with school work, as if schooling would create a sort of identity on its own. In contrast, the “true self,” conceptualized, not as a fragmented self, but as a whole, is subject to demystification and reduced to what we do.

Privileging an identity is similar to the experience of employing textbooks to promote a particular discourse of Puerto Rican identity or ideology in Puerto Rican schools. Students must choose between the false self-being imposed by American ways of being (the Americanization) and the true self-represented in a whole set of historical idiosyncrasies. For example, as indicated above, José Manuel Navarro (2002) described how social science textbooks were employed throughout the period following the American invasion to pursue what he calls a “spiritual conquest” of the Puerto Rican people. Schools were used as instruments of the state to indoctrinate students into the image of the U.S. as an imperial power at the expense of portraying inadequate images of Puerto Rican culture. Primarily, education functioned as an unidirectional activity with the explicit the goal of deculturation (Spring, 2010). Thus, conducting this study becomes significant since I will evaluate empirically (a) students’ sense of Puerto Rican-ness and (b) teachers’ notions about *lo nacional*.

Educators have distinct “labels,” names, nicknames, and descriptors for particular types of students (Hudak, 2001). For example, teachers may label students as overachievers or underachievers. These labels transcend the locality of the school and impact students’ sense of the self beyond school buildings, disenfranchising students from their capacities. Reciprocity and student empowerment assumes an important role in converting students into agents of (a) their identity formation and (b) learning process.

The concept of student agency emerges as an important aspect of the formation of identities and the teaching and learning process. Agency, as defined by Elmore (2005), implies “[students’] active consent and engagement with the social activity of learning” (p. 278). Elmore indicates, however, that the notion of students’ agency is problematic if the teaching and learning process does not foster “teacher’s active transfer of agency over learning from herself to the students” (p. 280). This means that teachers need to be held accountable for creating a learning atmosphere where both teachers and students are engaged with the learning process, and “putting herself in the position of ignorance and innocence about that which she is alleged to know” (p. 278). The act of transferring agency implies the complexity, reversibility, and reciprocity of student and teacher relations. Students bring to the classroom a whole set of sociocultural elements. As Rubin indicates, “[students] create meaning, identity, and a sense of themselves in the world by using a variety of sources, including existing constructions of ethnicity, race, gender and social class” (p. 450). Student agency, therefore, implies teachers’ acknowledgment and empowerment of what students bring to the classroom. Furthermore, students’ agency plays a significant role in determining and promoting their national identities under the condition of reciprocity between students and teachers. Adopting a reciprocal educational model permits the examination of identity at the macro and micro levels, as well as the local and global levels.

Fostering student agency and promoting children’s ownership of their learning processes are key, as children’s lessons on national identity narratives are presented as assuming the type of identity children should adopt. Student agency, however, implies students’ ability to (a) fail to learn those narratives, (b) learn and appropriate them, (c)

learn and resist them or (d) learn, reject, and seek alternative narratives (Wertsch, 1998).

Likewise, Barrett indicates that:

It does not necessarily follow that, just because these are representations of the nation that are to be found within textbooks and the curriculum, children themselves will necessarily internalize and appropriate these particular representations for themselves. In fact, the evidence available from other studies actually suggests that children often exhibit considerable diversity in their responses to the material about their own nation than they are taught at school. p. 105

Student agency assumes a pivotal role in accepting or rejecting national narratives. Barrett (2007) suggests that children do not necessarily assimilate national narratives taught in schools, especially when such narratives are subject to dispute. In other words, students challenge collective self-representations at the national level. They manage the historical narratives about the nation and develop their understanding of their national affiliation. This process suggests the convergence of subjective and social forces within the delivery of national narratives through schooling.

### **Teacher Practice and Instructional Methods**

Freire (2000) called for a reformulation of the educational process, in which the delivery of education cannot only constitute a process of depositing knowledge into students' heads. He advocated for the notion of banking education and the pedagogy of liberation. Similarly, Peter McLaren (1995) suggested that education would not be engaged with its liberatory aspiration if any expression of sociopolitical identity were censored. Moreover, privileging particular discourses in schools and denying them

comprehensive discussion of a given topic, limits students' possibilities of developing critical thinking skills (Kincheloe & McLaren, 2005).

Henry Giroux (1988), Freire's colleague and a prominent exponent of critical theory, dedicated a section of his book, *Teachers as Intellectuals: Toward a Critical Pedagogy of Learning*, to discuss and critique the role of social studies teachers in the classroom. Giroux advocates for the adoption of a critical pedagogy model, in which teachers recognize that students are situated within a sociopolitical context. Furthermore, ideology emerges as a central construct within the teaching and learning process. Peter McLaren describes such sociopolitical context and ideology in the Forewords of Giroux's book:

Ideology, as I use the term, is a dynamic construct that refers to the ways in which meanings are produced, mediated, and embodied in knowledge forms, social practices, and cultural experiences. In this case, ideology is a set of doctrines as well as a medium through which *teachers and educators make sense of their own experiences and those of the world in which they find themselves* [italics added]. (P. 5)

Giroux describes ideology as part of the educational process, stating: "ideology becomes useful for understanding not only how schools sustain and produce meanings, but also how individuals and groups *produce, negotiate, modify, or resist them* [italics added]. (P. 5). Within the context of how ideology is negotiated, student voice becomes a central concept to the understanding of critical theory. Peter McLaren noted:

...teachers must make classroom knowledge relevant to the lives of their students so that the students have a voice, that is, affirm student experience as part

of the pedagogical encounter by providing curriculum content and pedagogical practices which resonate with the life experiences of the students. (p. xvi)

Thus, imposing ideology in the classroom neglects the ultimate emancipatory experience in an educational setting: “enabling students to develop a social imagination and civic courage capable of helping them to intervene in their own self-formation” (p. xvii).

Also, Kumashiro, (2002) posits the need to “trouble” education. In Kumashiro’s view, troubling education implies that educators should look beyond what is taught and learned in the classroom; they should assess the delivery of ideals that, within the lens of anti-oppressive education, should not be oppressive or limit students’ opportunity to think critically. Similar to the notion of banking education, Bereiter, & Scardamalia (2005) warn educators to avoid thinking about education as a process of stocking goods into a kitchen’s cabinets. Filling out students’ minds with “chunks” of knowledge is not an effective practice as it prevents the development of critical thinking skills (ten Dam & Volman, 2004). Thus, given (a) the previous approach to education; (b) my experience as a student-teacher; (c) the historiography on how Puerto Rican schools have been used to promote discourses of PRNI; (d) the paths that students assume when taught historical narratives; and (e) the theory of identity as an unfixed construct, I respond to research questions in the next chapter. This study focus on identifying the themes that emerge in social studies classes in Puerto Rico, teacher practices, and student ideas about PRNI. I adopted a mixed methods approach with a concurrent embedded strategy.

## **Conclusion**

Throughout this review of the literature, the case of Puerto Rico serves as an ideal



context to investigate national identity. The promotion of particular models or discourses of “la puertorriqueñidad” (Puerto Rican-ness) or its identities occurred through the social studies curriculum (Acevedo Segarra, 1984; Eliza Colón, 1989; Navarro, 2002; Ortiz García, 1989). Analyzing what is taught in middle school social studies classes is essential to understanding the discourses of PRNI teachers deliver in their classes, and the identities students produce as a result of schooling. The use of power in schools to privilege specific discourses of identity in Puerto Rico becomes a social justice issue because privileging identities has the potential to restrain students from accessing different views in regards to PRNI. This research study has the potential to uncover conscious or unconscious educational activities that privilege certain ways of being Puerto Rican. As Kumashiro (2000) indicates, the privileging of identities in school settings oppresses students, and thus, turning education into a non-liberatory process.

## CHAPTER THREE

### METHODOLOGY

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In this chapter, I discuss the methodology that I used to conduct this study. I provide an overview of the current literature on mixed methods and the research design of the study. I describe the research sites, population, and sampling procedure along with the data collection methods. Finally, I elaborate on data analysis procedures and provide conclusions.

#### **Research Questions**

The literature review reflects the need for this study. The literature shows how social studies classes have been used to define the concepts and terms related to Puerto Rican national identity. Scholarship on the history of education in Puerto Rico found that political, state, and even religious entities have employed the education system on the island in order to advance specific ideas, notions, views and ideologies about Puerto Rican-ness.

I aimed to identify what is taught about Puerto Rican national identity (PRNI) and how 7<sup>th</sup> grade social studies students identified themselves in terms of national identity as a result of schooling. In other words, I aspired to unveil the principles that foster Puerto Rico's national character in social studies classes. I evaluated how strongly students identify with PRNI. Student identification with PRNI emerged in social studies classes, as the study was conducted during an election year. Also, Puerto Ricans were preparing to celebrate a plebiscite regarding Puerto Rico's political status.

Thus this study addressed the following research questions:

- What themes of Puerto Rican national identity emerge in social studies classes in PR?
- How do social studies teachers in the 7<sup>th</sup> grade deliver concepts related to PRNI?
- How important is national identity for 7<sup>th</sup> grade social studies students in Puerto Rico?
- How do 7<sup>th</sup> grade students identify themselves in terms of national identity in PR?

A mixed method approach provided an adequate methodological framework for the study of the delivery of social studies classes, teacher practice, and the concept of national identity in Puerto Rico. The research questions suggest a methodological approach where observation, (Adler & Adler, 1998; Angrosino & Rosenberg, 2011) focus groups, (Kamberelis & Dimitriadis, 2011; Merriam, 2009) and a survey, The Strength of Identification Scale (Barrett, 2000, 2007) (See Appendix H), provided rich perspective regarding the phenomenon of the study.

### **Mixed Methods**

In this study, I employed a mixed methods design with a concurrent embedded strategy (Creswell, 2009, p. 214) (see the *Research Design* section for a description of a concurrent embedded strategy on page 64 for more details). For now, it is pragmatic to define and identify the general features of mixed methods research prior to elaborating on the characteristics of a concurrent embedded strategy. According to Creswell, Plano Clark, Gutmann, and Hanson (2003), a mixed methods study:

Involves the collection or analysis of both quantitative and/or qualitative data in a single study in which the data are collected concurrently or sequentially, are given a priority, and involve the integration of the data at one or more stages in the

process of research. (p. 212)

Similarly, Johnson and Onwuegbuzie (2004) indicate that mixed methods research refers to: “the class of research where the researcher mixes or combines quantitative and qualitative research techniques, methods, approaches, concepts, or language into a single study” (p. 17). Furthermore, Creswell et al. (2003) stated that: “Mixing provides an umbrella term to cover the multifaceted procedures of combining, integrating, linking, and employing multi-methods in research” (p. 212). Thus, mixed methods studies facilitate a comprehensive understanding of a phenomenon, while mixing methods of inquiry.

Tashakkori and Teddlie (2003) evaluate the current state of mixed methods research and provide a typology that differentiates between *mixed method research* and *mixed model research*. Mixed method research uses qualitative and quantitative forms of inquiry limited to the methods of data collection, such as interview and surveys, observations, and content analysis (Tashakkori & Teddlie, 2003, p. 11). On the other hand, mixed model research employs a model of inquiry that is both qualitative and quantitative in nature, integrated into every aspect of a given study, including the research questions, data collection procedures, and the analysis of the findings (Tashakkori & Teddlie, 2003, p. 11). This distinction is important, as this study possesses a predominantly qualitative thrust, but adds a quantitative method of data collection. Stated differently, I embedded “a secondary form of data within a larger study” (Creswell, 2009, p. 208).

Creswell and Plano Clark (2007) further elaborate on the features of mixed methods research designs. For example, the research design constitutes the plan of action

(or strategy) of the study: ethnographic, quasi-experimental, mixed-methods, or life history. The methods of a study refer to “the techniques of data collection” employed in the study (Creswell & Plano, 2007, p. 4). Since several scholars support the employment of mixed methods research designs to address research questions in a more comprehensive fashion (Creswell & Plano Clark, 2007; Johnson & Onwuegbuzie, 2004; Tashakkori & Teddlie, 2003), this study mixed an array of both qualitative and quantitative methods of data collection tools (Creswell et al., 2003).

The employment of mixed methods comes with a set of specific advantages while conducting research. Creswell and Plano Clark (2007), for example, compiled a list of the benefits of a mixed methods design. The epistemological assumption of a mixed methods design presumes that

- mixed methods designs will compensate for the weaknesses of either qualitative and quantitative approaches and will facilitate a better understanding of a research problem “than either approach alone” (p. 9);
- researchers become entitled to use various methods of data collection and do not become restricted to the group of methods associated with either approach;
- mixed methods assist in the process of answering certain research questions that may not be properly addressed using a single approach;
- inquiry becomes enhanced with a collaborative non-competitive approach between qualitative and quantitative approaches, and;
- mixed methods represent a persuasive and practical design that illustrates a phenomenon using words and numbers as illustrative resources. These advantages reveal the level of comprehensiveness mixed methods studies possess.

Thus, mixed methods in the context of this study further unveiled what is taught about Puerto Rican identity in 7<sup>th</sup> grade social studies classes, with particular attention to how teachers talked about national identity, and how students identified themselves in terms of their national identity.

### **Research Design**

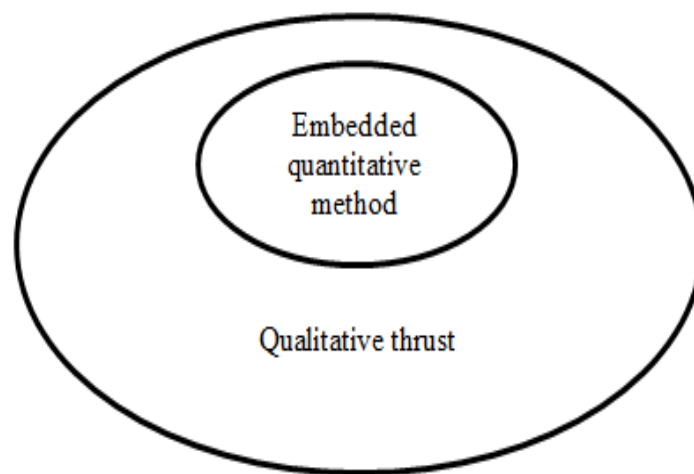
The plan of action of this study consisted of a concurrent embedded strategy. Creswell et al. (2003) indicates that in a concurrent embedded strategy, a dominant model gives direction to the project:

Given less priority, a method [in this case a quantitative method] is embedded, or nested, within the predominant [qualitative] method. This nesting may mean that the embedded method addresses a question different from that addressed by the dominant method or that the embedded method seeks information from different levels. (p. 230-231)

I adapted this strategy to “embed” a quantitative method of data collection into a dominant qualitative research approach. If I had used a standalone dominant research approach (Creswell et al., 2003), I would have been unable to provide comprehensive insights and contentions (inductive and deductive) regarding the phenomenon of the study. Therefore, the Strength of Identification Scale (SoIS), a survey measuring students’ perception about national identity, was nested into the predominant qualitative thrust. Using the SoIS provided statistical data demonstrating how strongly students in Puerto Rico identify with Puerto Rican national identity as a result of the social studies class (see *Figure 3* is a visual representation of the concurrent embedded design).

Audio recordings and transcriptions of classes in session sought information

relevant to the instances when teachers directly or indirectly talked about identity in the classroom. The SoIS allowed me to gather quantitative data in the form of descriptive statistics (the mean and the median), shedding light over how strongly 7<sup>th</sup> grade students identified with Puerto Rican national identity. In turn, separate focus groups with students and teachers provided the context to further explore findings collected through audio recordings and transcription of classes in session and the survey.



*Figure 3.* Illustration of the embedded research design

The data collection in a concurrent embedded strategy consists of one phase where “both quantitative and qualitative data are collected simultaneously” (Creswell, 2009, p. 214). In this study, I used three methods of data collection concurrently. The embedded or nested quantitative method consisted of the administration of the SoIS. (See Methods of Data Collection section for more details about each method of data collection on page 66).

Triangulation ensured internal validity by arranging for multiple methods of data

collection (Merriam, 2009). The use of these three methods of data collection fulfilled the expectation to triangulate the data. Referring to triangulation as a strategy for internal validity, Merriam stated that:

. . . [W]hat someone tells you in an interview can be checked against what you observe on site or what you read about in documents relevant to the phenomenon of interest. You have thus employed triangulation by using three methods of data collection—interviews, observations, and documents. (p. 216)

Thus data was collected through:

- Fieldwork: Bi-weekly audio recordings of three sessions of 7<sup>th</sup> grade social studies classes in two schools.
- Focus group interviews with 7<sup>th</sup> grade students and teachers.
- The administration of the SoIS in a control group experimental design.

### **Methods of Data Collection**

Audio recordings and the transcription of 7<sup>th</sup> grade social studies classes in session provided a first-hand account of the occurrences associated with the delivery of the social studies curriculum. The administration of a survey revealed how students identified themselves in terms of their national identity. At last, focus group interviews corroborated initial findings gathered through fieldwork and the survey. These methods of data collection will provide an in-depth overview of the current relationship between social studies classes and students' understandings of themselves as Puerto Ricans.

**Qualitative thrust.** The qualitative portion of the study consisted of the audio recording of 7<sup>th</sup> grade social studies classes in session and focus group interviews with teachers and students. Initially, I observed and audio recorded the natural course of social



studies classes. Then, through focus group interviews, I asked participants to describe their experiences with teaching and learning about national identity. Both audio recordings of classes and focus group interviews were transcribed and analyzed through open and axial coding. Additionally, participants allowed me to collect documents and artifacts related to the social studies class, such as lesson plans and instructional materials, to provide some context to the recordings.

**Audio recordings.** Merriam (2009) suggests the use of audio recording devices to obtain meaningful data. Merriam recommends the use of “a tape recorder [that] can be placed somewhere at the site of the observation, such as in the middle of a classroom or a group meeting; this tape recording can aid in writing up field notes of the observation” (Merriam, 2009, p. 128-129). Similarly, Erickson (2011) stated that: “Careful elicitation techniques and increasing use of audio and audiovisual recording were [are] used in attempts to get ‘better data’” (p. 49). I used the built-in audio recording feature of an iPhone 3G to record social studies classes.

**Researcher’s position.** My position as an observer was that of an *observer as participant*, which Adler and Adler (1998) describe as an observer who: “observe[s] and interact[s] closely enough with members to establish an insider’s identity without participating in those activities constituting the core of group membership” (p. 85). This positioning gave me access to the daily activities of social studies middle school classrooms and become a “spectator” of the events taking place. Similar to Adler and Adler, Spradley (1980) describes a researcher’s passive participation as follows:

. . . [An] ethnographer engaged in passive participation is present at the scene of action but does not participate or interact with other people to any great extent.

About all you need to do is find an “observation post” from which to observe and record what goes on. If the passive participant occupies any role in the social situation, it will only be that of “bystander,” “spectator,” or “loiterer”. (p.59)

Acting as a spectator, I observed the dynamics of social studies classes from the back of the room. The back of the classroom served as the *observation post* for collecting data. Locating myself in a non-disruptive position allowed me to observe social studies classes in their “natural” setting and prevented me from interrupting the natural atmosphere (Adler & Adler, 1998).

However, audio recordings alone in the context of a class may not reveal how people interpret the world, and more importantly, their understanding of the phenomena under study (deMarrais, 2004; Kvale, 1996; Merriam, 2009). In turn, my goal was to have access to participants’ perspectives through a one-on-one encounter. Therefore, I used interviews as a second method of data collection in this study.

**Focus groups interviews.** Interviews provide access to someone’s life themes (McNamara, 2008). In fact, McNamara (2008) further suggests that interviews serve to further understand participants’ responses to questionnaires. Gall, et al. (2007) states that: “interviews consist of oral questions asked by the interviewer and oral responses by the research participants” (p. 228). Similarly, deMarrais (2004) states that interviews are: “a process in which a researcher and participant engage in a conversation focused on questions related to a research study” (p. 55). Interviews collect data about researchable items that cannot be recorded through observations.

Besides individual interviews, focus groups provided me with an opportunity to obtain historical information pertinent to the study (Creswell, 2009). Patton (2002)

suggests that: “in a focus group participants get to hear each other’s responses and to make additional comments beyond their own original responses as they hear what other people have to say” (p. 386). Furthermore, “the object [of the focus group] is to get high-quality data in a social context where people can consider their own views in the context of the views of others” (p. 386). Focus group interviews with students and school personnel elicited the data on individuals’ views in the context of others.

Interviews with students and teachers were audio recorded, transcribed, and analyzed. Interview protocols for students (see Appendix G) and for teachers (see Appendix F) consisted of a group of questions exploring (a) the delivery of social studies classes and (b) participants’ understanding of Puerto Rican national identity. Focus group interviews gave me the opportunity to compare and contrast preliminary findings collected through observations and the SoIS. Focus groups provided a methodological context where individuals exhibited knowledge of the phenomenon of the study (Creswell, 2009; Merriam, 2009) and assisted me in unveiling the proximity of emerging findings to participants’ perspectives (see *Figure 3* for a diagram illustrating the relationship of these three methods of data collection). Thus, I selected a classroom in which to conduct focus group interviews. Participants met with me in a designated room and interviews were conducted and recorded.

**Survey: The Strength of Identification Scale.** The Strength of Identification Scale (Barrett, 2007) is a measurement instrument that has been employed in multiple studies (Alexander, 2002; Dixon, 2002; Forrest & Barrett, 2001; Sahlabadi, 2002; Manouka, 2001 and Maehr & Barrett, 2005) to measure children’s level of identification with national identity. For example, Forrest and Barrett studied adolescents between the

ages of 11-15 in the context of Englishness. This study revealed that the adolescents' strength of identification with being British does not vary with age, but does change according gender. The study suggested that boys identify more with being English than do girls. Dixon measured how strongly students of different ethnic backgrounds, including students from the Caribbean, identified with Englishness. Dixon's findings demonstrate that Englishness acted as a function of being white, since non-white minorities showed lower scores in the scale. According to Barrett (2007), these studies demonstrate that "different groups of children living in different national and state contexts often exhibit different patterns of identity development" (p. 250). Barrett's findings show the importance of this measurement in the context of Puerto Rico. Although this measurement has been mostly employed in studies in Europe, the administration of the SoIS assisted with understanding national identity in Puerto Rican adolescents.

There are two ways to use the SoIS: one for children 5-11 years old and another for adolescents 11-16 years old. The SoIS measures several dimensions associated with the degree of national identity. Barrett (2007) indicates that the scale measures five dimensions: degree of identification, pride, importance, feeling, and internalization. However, the researchers mentioned above employed a seven item questionnaire for adolescents 11-16 years old, arguing that older adolescents are capable of managing complex constructs regarding national identity that younger children cannot.

As the participants in this study aged between 11-13 years old, a similar questionnaire was employed. Barrett (2007) indicates that, "When 7-point scales are used with 11-16 year olds, the final score is the average score across the five dimensions." The

final score, then, represents “whether national identity is present.” This means that the average score for each item represents a low or high level of identification with national identity. Consistent with Barrett (2007), a total score of 7 to 35 is possible, yet the cut-off criterion to determine high or low levels of identification with national identity for the scale was 18.

### **Research Site**

Research was conducted in two middle schools from different school districts located in the central –east region of the island. Research site #1 is located in a rural municipality in central Puerto Rico, whereas research site #2 could be best described as an urban middle school.

As of March 2010, Escuela Intermedia Ricardo Ernesto Buenaventura, research site #1, had an enrollment of approximately 628 students and 39 teachers. The school currently provides instruction to 7<sup>th</sup> to 9<sup>th</sup> grade students in English, mathematics, science, social studies-history, and Spanish. An urban public middle school in central Puerto Rico, this school has been operating under an improvement plan for six years due to low levels of academic achievement. Test scores show that 7<sup>th</sup> grade students possess low levels of proficiency in Spanish (34%), English (27%), and mathematics (1%).<sup>18</sup> Academic Yearly Progress (AYP), a term introduced by the No Child Left Behind Act of 2000, defines and establishes levels of achievement and performance in schools. For a school to be considered as improving, students need to score at least 60% in English, Spanish, and mathematics.

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<sup>18</sup> School profiles and test scores reports were retrieved from Departamento de Educación de Puerto Rico’s website: <http://www.de.gobierno.pr/directorio-escuelas>

In this school, seventh graders constitute 22% of the total student population. There are five groups of 7<sup>th</sup> graders; each group consists of 28 students for a total of 140 students in 7<sup>th</sup> grade. In terms of the students' socioeconomic status (SES), 11% of the student population in school A falls under the poverty line. Mr. Almeida, a social studies teacher with twenty-five years of experience and Mrs. Janet, a novice teacher, consented to participate in the study.

Research site #2, Escuela Intermedia Jaime Francisco Kendal, has a total of approximately 267 students and 21 teachers. Also an urban public middle school in central Puerto Rico, it provides instruction at the 7<sup>th</sup> grade level in English, mathematics, science, social studies-history, and Spanish. The school also provides Special Education services. At the time the research was conducted, no data existed in the school profile data sheet for 7<sup>th</sup> grade test scores and AYPs. However, comparing 8<sup>th</sup> grade data between research site #1 and #2 provided a comprehensive idea on how both schools compare in terms of academic achievement. In 2007-2008, 8<sup>th</sup> graders at research site #1 possessed overall higher levels of academic proficiency as compared to 8<sup>th</sup> graders in research site #2. For example, research site #1 demonstrated 44% proficiency in Spanish, 54% proficiency in English, and 45% proficiency in mathematics. Research site #2, on the other hand, reported 35%, 59%, and 40% of proficiency on the same subject matters, respectively. For both schools, AYP goals are set to 60% or more. These numbers suggested that, overall, research site #1 possessed slightly higher levels of proficiency as compared to research site #2. At the time this study was conducted, both schools were under an improvement plan.

At research site #2, seventh graders constituted 56% of the student population.

There were six groups in 7<sup>th</sup> grade. Each group consisted of 25 students for a total of 150 students. Mr. Ramírez and Mrs. Ortega consented to data collection in their classrooms. Both social studies teachers possess less than two years of experience in the classroom.

### **Population and Sample: Sampling Procedure**

Since I used a concurrent embedded strategy with a predominant qualitative thrust, nonprobability sampling (Patton, 2002) emerged as the appropriate sampling procedure. Nonprobability sampling is often the choice of qualitative researchers, because qualitative research avoids answering questions suggesting quantity or repetitiveness. Instead, a qualitative thrust answers questions suggesting relationships, implications, and phenomenon (Merriam, 2009).

Nonprobability sampling concerns emerging findings and concepts, with less emphasis on generalizability. I aspired to “discover, understand, and gain insight [in regards to the phenomenon of the study],” therefore I needed “a sample from which the most can be learned” (Merriam, 2009, p. 77). Purposeful or purposive sampling (Chen, 1981; Patton, 2002) “directly reflects the purpose of the study” (Merriam, 2009, p. 78). Thus, the advantage of purposeful sampling relies on the selection of “information-rich” cases (Patton, 2002, p. 230). This means that the researcher acknowledges the possibility of learning “a great deal” (Merriam, 2009, p. 77) from the sample selected about the phenomena central to the research questions. Therefore, I chose to employ criterion sampling in order to select research participants.

A total of 126 students and seven teachers (see Table 3 and Table 4 for further details) participated of this study. Students were asked to respond to a survey. The sample of students who responded to the survey were invited to participate in focus groups

interviews. A total of seven social studies teachers participated in focus group interviews, but only four of them were invited to participate in the observation part of the study.

I used criterion sampling as a strategy to invite subjects to participate in the focus group interviews. Criterion sampling implies the development of certain criteria that the researcher establishes to select a sample. Teachers needed to follow the sampling criteria:

- social studies teachers (certified or student-teachers);
- location;
- teaching the social studies course in 7<sup>th</sup> grade;
- knowledge of teacher practices and instructional methods (very knowledgeable, knowledgeable, somewhat knowledgeable, not knowledgeable), and;
- willingness and availability to participate in the research study.

These criteria allowed me to identify research participants who provided me with information rich data.

On the other hand, students were invited to participate in the focus group interviews based upon their level of engagement and participation in the social studies class (outspoken in class or not outspoken).

### **Validity and Reliability**

Validity and reliability are major concerns in conducting research. Scholars of both quantitative and qualitative paradigms would agree that: “All research is concerned with producing valid and reliable knowledge in an ethical manner” (Merriam, 2009, p. 209). Definitions of these concepts are subject to debate and have been discussed extensively (Golafshani, 2003). Thus defining these terms is crucial for researchers to conduct a study and report trustworthy results. According to Merriam (2009) “Research



designs are based on different assumptions about what is being investigated, and seek to answer different questions” (p. 210). Reliability and validity assume different meanings for quantitative and qualitative research. It is appropriate to examine the meaning of reliability, validity, and trustworthiness in both quantitative and qualitative research.

**Validity.** In order to establish validity in qualitative studies, researchers use several strategies. Merriam (2009) indicates that: “Though qualitative researchers can never capture an objective ‘truth’ or ‘reality’ there are a number of strategies that you as a qualitative researcher can use to increase the ‘credibility’ of your findings’ ” (p. 215). To establish validity, it is important to assess whether the data of a study supports the findings, which allows researchers to report credible results. Credible results are produced if several strategies are adopted towards that end. Merriam indicates that (a) triangulation, (b) members check, (c) engagement in collecting data, and (d) reflexivity are strategies to be used in qualitative research to establish validity. Triangulation refers to the use of “multiple investigators, sources of data, or data collection methods to confirm emerging findings” (p. 229). Members check implies involving research participants in the research process by sharing the researcher’s initial interpretations of the data collected with participants. Engagement with the data means: “adequate time spent collecting data such that the data becomes ‘saturated’; this may involve seeking *discrepant* or *negative* cases [emphasis in original]” (p. 229). Finally, reflexivity implies: “critical self-reflection by the researcher regarding assumptions, worldview, biases, theoretical orientation, and relationship to the study that may affect the investigation” (p. 229). If these activities are conducted carefully, researchers can claim validity in their study.

In quantitative studies, validity refers to whether a measurement instrument measures in actuality that which was intended to be measured (Salkind, 2010). According to Salkind, three types of validity exist: (a) content validity, (b) criterion validity, and (c) construct validity:

- Content validity refers to the judgment of an expert over how “[in a given test] test items sample the universe of items for which the test is designed” (p. 113). In other words, content validity assesses whether the test measures what it is designed to measure.
- Criterion validity refers to “whether a test reflects a set of abilities in a current or future setting” (p. 114). Salkind explains that there are two types of criterion validity: (a) concurrent criterion validity and (b) predictive concurrent validity. Concurrent criterion validity refers, for example, to instances where a teacher is tested on their performance and their score is correlated to another measurement (the criterion) taken at the same time. If the correlation coefficient between the two measurements is low, then, the initial test is invalid. On the other hand, predictive validity is established employing the previous procedure, but the two measurements are obtained at a different time to predict teacher performance. For example, first year teachers’ performance scores could be correlated with other specific criteria that describe what it means to be an outstanding teacher (e.g. tenured teacher, teaching awards, and accomplishments). High correlation coefficients between the measures indicate predictive validity.
- Finally, construct validity is accomplished when a test exhibits high correlation

between items measuring a construct (e.g. happiness). For example, in a test measuring happiness, there will be two types of items: a happiness scale and items that either reflect behaviors associated with happiness or unhappiness. A high correlation between scores on the happiness scale and items describing behaviors associated with happiness demonstrate construct validity. This implies that the scale is valid as it measures the construct that it was designed to measure. As for the items that do not reflect behaviors associated with happiness, low correlation between scores on the happiness scale and such items demonstrate that “there is something about the [happiness] scale . . . that works” (Salkind, 2010, p. 116).

In sum, validity in quantitative studies depends on whether the measurement instruments measure what they intend to measure.

**Reliability.** Little consensus exists in the academic community regarding validity and reliability in qualitative research (Merriam, 2009). For example, Lincoln and Guba (1985) employed a series of different terms to refer to reliability and validity in qualitative research. In certain instances, terms such as “credibility, transferability, dependability, and conformability substitute for internal validity, external validity, reliability, and objectivity” (Merriam, 2009, p. 211) are used in place of validity and reliability. Scholars agree that it is more relevant to pay attention to “the researcher’s careful design of the study, applying standards well-developed and accepted by the scientific community” (Merriam, 2009, p. 210). For example, Gold (1997), in a comprehensive discussion on how to be a scientific observer, stated that researchers ensure validity and reliability by: “adequate and appropriate sampling procedures,

systematic techniques for gathering and analyzing data, validation of data, avoidance of observer bias and documentation of findings” (p. 399). If these elements of qualitative research are present in a given study, the findings of the study become reliable, credible, and the research becomes accepted.

In the tradition of quantitative studies, reliability refers to the “consistency, stability, and precision of test scores” (Gall, Gall & Borg, 2007, p. 151). This notion implies that research instruments are considered reliable when a test produces consistent results over time. Stated in a different way, reliability consists of “whether a test, or whatever you use as a measurement tool, measures something consistently” (p. 142). As an example, on a self-esteem test, a test taker obtains a score of 72 on a scale of 100 points. If the same test taker is tested with the same instrument at a later time and obtains a score of 71 points, the test is reliable. Although a simple example, consistency remains the key component when discussing reliability in conducting research.

To address validity and reliability within the qualitative thrust of the study, I used several strategies:

- content validity;
- triangulation;
- members check;
- engagement in data collection;
- reflexivity, and;
- the use of an external auditor.

In regards to content validity, faculty members assisted me in the process of designing interview protocols that were used in conducting interviews. Faculty members

were experienced researchers in the fields of Anthropology, Educational Psychology and Social Studies Methods. Second, I piloted the interview protocol as part of a doctoral level course, in which I conducted a field experiment with social studies teachers and educators. Triangulation, observations, interviews, and a survey were used to obtain different sources of data. Third, I asked research participants for feedback on preliminary results, or as Merriam describes it, I “solicit[ed] feedback” from research participants as patterns and themes emerge (Merriam, 2009, p. 217). Fourth, I continued to collect data until “emerging findings feel [felt] saturated” (Merriam, 2009, p. 217). I also used theoretical memos and reflexivity to describe and clarify my “assumptions, experiences, worldview, and theoretical orientation to the study at hand” (Merriam, 2000, p. 219). Additionally, I developed an “audit trail” (Lincoln & Guba, 1985) that describes in detail “how data were collected, how categories were derived, and how decisions were made throughout the inquiry” (p. 223).

Since the Strength of Identification Scale is an existing instrument, I have described its validity and reliability using “scores obtained from past use of the instrument” (Creswell, 2009, p. 149). Several studies conducted in Europe have used the SoIS, and according to its developer, “the scores produced by the SoIS items always loaded onto a single factor and always scaled reliably” (Oppenheimer & Barrett, 2011, p.18 ). Moreover, acceptable levels of test-retest reliability have been reported in the studies cited above. Thus, the SoIS “might be a good one to use in survey research” (Creswell, 2009, p. 149) as the instrument has been employed in many studies where its validity and reliability have reached acceptable levels.

## **Data analysis**

I employed open and axial coding (Strauss & Corbin, 1990) in the process of category construction (Merriam, 2009) and descriptive statistics to analyze the data at multiple levels. For example, I conducted a survey at one level of the study (students) to obtain quantitative results in regards to their understandings of national identity. On the other hand, I also collected qualitative data at another level (teachers) to “explore the phenomenon [of the study] with specific individuals” (Creswell, 2009, p. 219).

**Qualitative thrust.** According to Merriam (1998), “the right way to analyze data in a qualitative study is to do it *simultaneously* [emphasis in original] with data collection” (p. 162). In other words, the analysis of the data will be conducted along with the data collection process. Category construction, which is “a theme, a pattern, a finding, or an answer to a research question” (Merriam, 2009, p. 178), will be employed to assign codes to pieces of data. According to Strauss and Corbin (1990), open coding involves the process of producing categories of data. Axial or analytical coding, on the other hand, implies sorting open codes into groups, forming categories. The researcher’s challenge, according to Merriam, is to “construct categories or themes that capture some recurring pattern across the data” (p. 181). Thus, categories were related to other categories and subcategories, so that relationships were compared and contrasted against the data. A code book was prepared and attached as an appendix (see Appendix N).

With that objective in mind, I used ATLAS.ti (a computer software) to produce and generate codes and categories. With the assistance of this software, I was able to identify recurrent themes, patterns, findings, or answers associated with the delivery of social studies classes and national identity in Puerto Rico.

**Memos.** Merriam (2009) suggests the use of memos to establish an audit trail to enable the researcher to track their methodological and theoretical decisions. In this study, I relied on the use of theoretical and methodological memos to illustrate “in detail how data were collected, how categories were derived, and how decisions were made throughout the inquiry” (p. 223). Theoretical memos allowed me to reflect upon emerging themes, patterns, ideas, and possible answers. On the other hand, methodological memos recorded my reflection of research procedures, decisions, and problems found while conducting the study.

**Quantitative embedded method.** I used the latest version of SPSS for Windows to compute statistical data. Descriptive statistics (mean and median) were employed to analyze quantitative data and to present frequencies on the levels of identification with Puerto Rican national identity. The data was tabulated, graphed, and presented to help me understand how 7<sup>th</sup> grade students view national identity.

**Additional considerations.** A letter requesting permission to conduct research within the Caguas Educational Region in Puerto Rico was either mailed or delivered personally to district and school personnel asking for permission to conduct the study on school premises. This letter described the purpose of the research and research procedures. Also, teachers and school personnel from the educational region received a letter with an invitation to participate in this research study. The Regional Office of Education granted permission to conduct research activities (see Appendix I)

The process of data collection complied with all Institutional Review Board (IRB) regulations (see Appendices I and J for IRB approval). Also, this research was conducted with the explicit consent of research participants. In the case of minors, a parental consent

and an assent form were used (see Appendices C, D, and E).

### **Conclusion**

This chapter outlines the methodology and methods of data collection that were employed in this study. I will employ a mixed method approach with a concurrent embedded strategy. Audio recordings of classes in session, focus groups, and the administration of a survey were employed as methods of data collection. The administration of a survey was nested into a predominant qualitative research approach. The research design unveiled how teachers teach about Puerto Rican national identity in social studies classes and the level of importance 7<sup>th</sup> graders associate with being Puerto Rican.



## CHAPTER FOUR

### FINDINGS

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“Yo me siento puetorriqueño, pero no me gusta Puerto Rico.”

[I feel Puerto Rican, but I do not like Puerto Rico]

-7<sup>th</sup> grade social studies student

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This chapter employs qualitative and quantitative methods of data collection to present the themes of PRNI that emerged in social studies classes in Puerto Rico. Audio recordings of classes and focus group interviews constitute the qualitative thrust of the study. I used the Strength of Identification Scale (SOIS), a survey that measures individual affinity for national identity, to interpret quantitative data about national identity for 7<sup>th</sup> grade social studies students in Puerto Rico. I present descriptive statistics to identify PRNI themes. I adopted a qualitative focus with a concurrent embedded strategy of survey data to conduct this study. The research questions about Puerto Rican national identity and how students self-identify with this construct are addressed and considered below.

This chapter is organized by research questions, using a thematic organizational framework, emphasizing the themes, topics, and concepts that emerged throughout the analysis.

#### **Purpose of the Study**

This study examines the delivery of social studies classes in Puerto Rico. I

reviewed the emergence of themes of national identity in social studies classes and the importance of national identity for 7<sup>th</sup> grade social studies classes in Puerto Rico. The data collected shows (a) teachers' actions and methods as they taught the social studies curriculum and (b) students' perceptions about their own national identity.

Two research sites located in two municipalities of central Puerto Rico were identified. These two sites represent both urban and rural settings; 99% of the student body is of Puerto Rican origin. I assumed a critical standpoint while exercising the role of a researcher. I observed, interviewed, and clustered narratives and themes meaningful to the study. In sum, I wanted to know how teachers and students understood national identity. As the literature suggests, PRNI means different things to different people. This study sheds light on what social studies teachers teach in regards to PRNI and what students learn about it.

### **Participants and Procedures**

Seventh-grade social studies teachers and students participated in this study. I collected data collected from February to May of 2012. I conducted this study in two research sites: public middle schools within an Educational Region in central Puerto Rico. A total of seven social studies teachers and 126 students participated in the research activities outlined in this dissertation. Five teachers were recruited from research site #1 and two additional teachers were recruited from research site #2, for a total of seven teacher participants. Only four teachers provided consent to conduct audio recordings of classes in session: Mr. Almeida and Mrs. Janet were recruited from research site #1 and Mr. Ramirez and Mrs. Ortega from research site #2.

Table 3

*Teacher Participants.*

Research activity:	Research site #1		Research site #2		Total participants
Number of participants in focus group interviews :	5 participants		2 participants		7 teachers
*Audio recording of classes	Mr. Almeida	Mrs. Janet	Mr. Ramirez	Mrs. Ortega	4 teachers
<i>Note:</i> Out of the seven teachers that participated of the focus group interviews, only four teachers provided consent for the audio recordings of classes. Additionally, Mrs. Janet was peripheral to the study, an informant. This means that the major interest of the researcher was placed in Mr. Almeida, Mrs. Ortega, and Mr. Ramírez.					

Audio recordings of classes in session and teacher and student focus group interviews were transcribed, subject to open and axial coding, and further analysis. I conducted a focus group interview with different groups of teachers and students: a) research site #1 provided one group of teachers and one group of students and b) research site #2 provided one group of teachers and two groups of students.

The Strength of Identification Scale was administered to a total of 126 students; seventy-one students were recruited from research site #1 and fifty-five students from research site #2. Out of this total, twenty students participated in focus group interviews (see Table 4 below for further details).

Table 4

*Student Participants.*

Research activity:	Research site #1	Research site #2	
Focus group interviews with students	Focus group 1	Focus group 2	Focus group 3
Number of participants on each focus group	(8 participants)	(5 participants)	(7 participants)
Survey	71 students	55 students	

Participants provided consent to the research activities of this study. In the case of minors, parents provided consent and minors filled out an assent form as described in Chapter 2.

**Quantitative Results**

Quantitative data provided a measure that identified students' level of identification with PRNI. This measure offers a numerical snapshot of the sentiments associated with national identity in the social studies classroom. The designed study emphasizes the integration of both qualitative and quantitative methods of data collection to integrate findings from two different research traditions. A concurrent embedded strategy employed in this study brought together the advantages of both approaches. Quantitative data is presented first with the purpose of inserting quantitative results into the larger context of qualitative findings.

**Strength of Identification Scale.** Student participants were in the 7<sup>th</sup> grade level, attending a public school located within an Educational Region in central Puerto Rico.

Certified social studies teachers taught the classes. These results prompted me to further investigate and conduct focus group interviews with students. The mean age of the sample (N = 126) was 12.5 years (SD = .66, range 12 to 15), the typical age for 7<sup>th</sup> graders. Half of the sample (50%) self-identified as male and the other half (50%) as female. Students' self-identified their socioeconomic classes: 42.1% lower middle class, 30.2% working class, 17.5% upper middle class, 8.7% lower class, and 1.6% upper class.

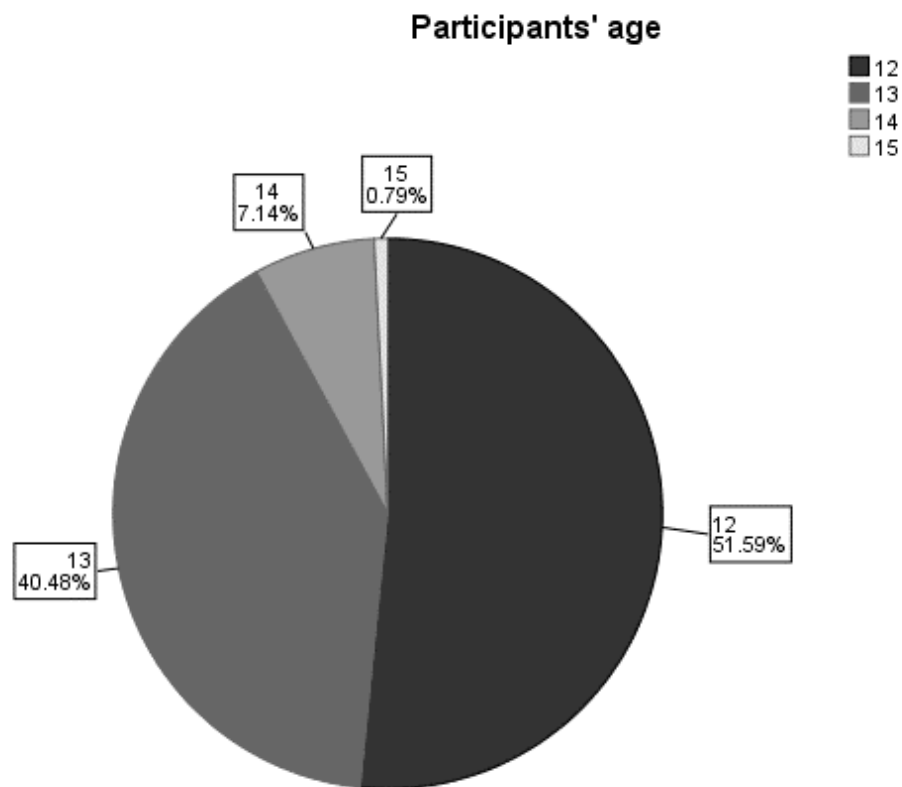
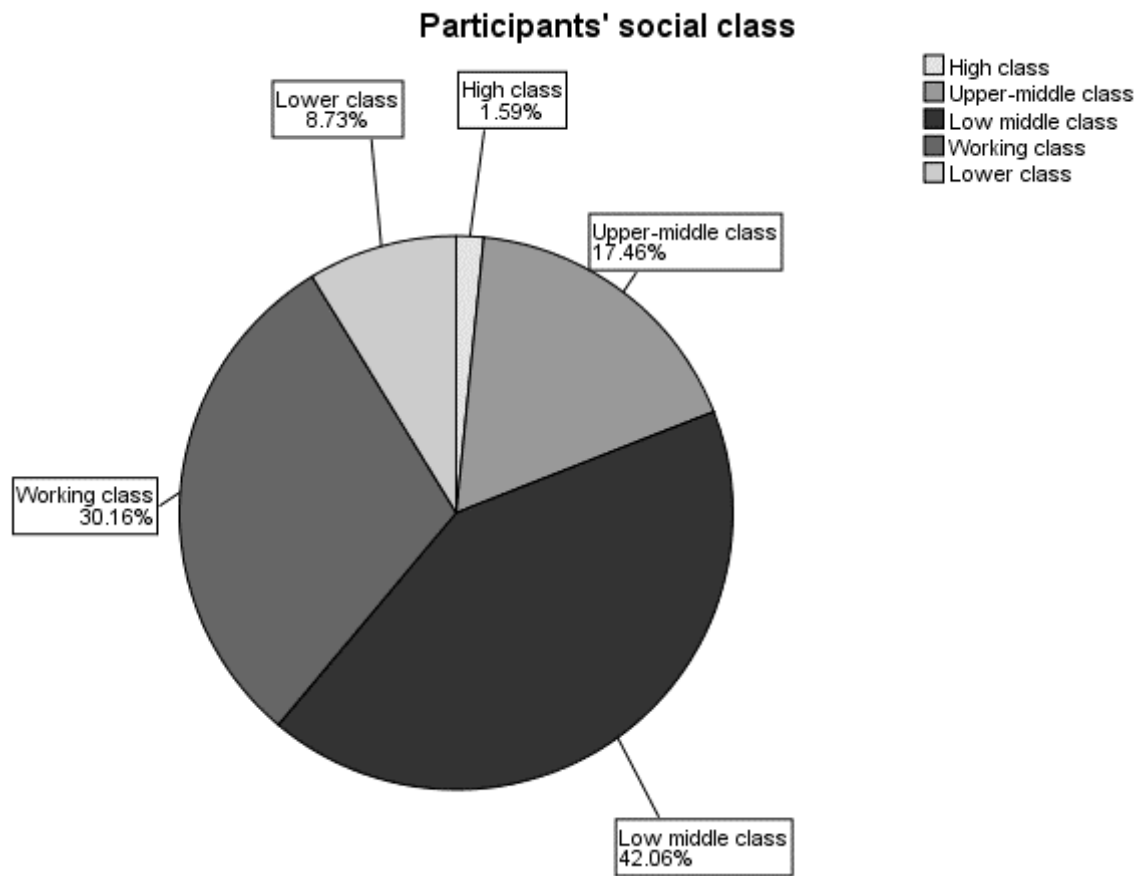


Figure 4. Students' age group. This figure illustrates student participants' age.



*Figure 5.* Students' social class. This figure illustrates student participants' perceptions of their socioeconomic status.

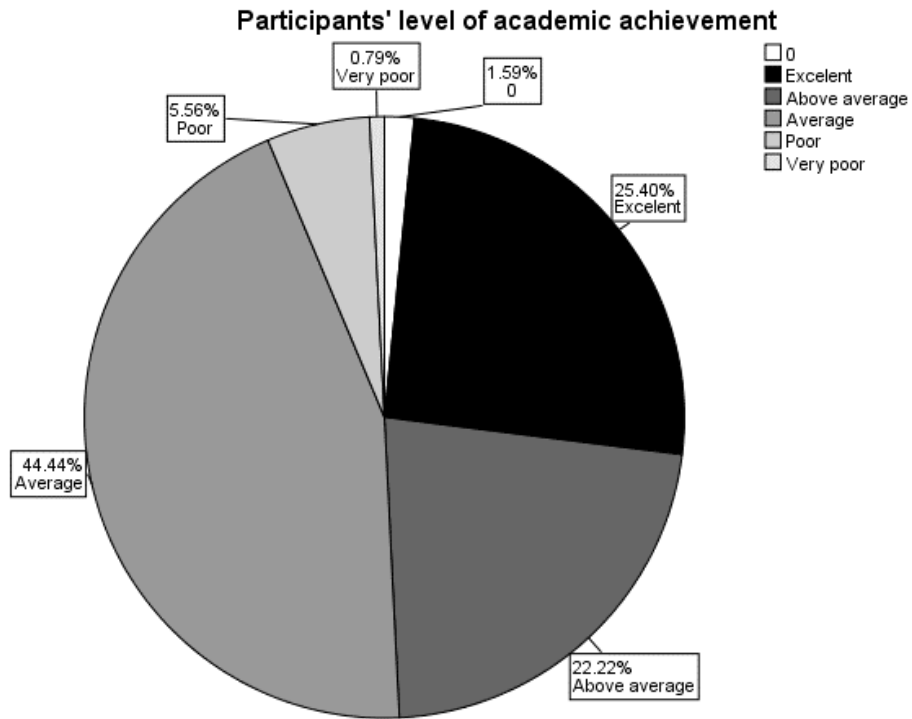


Figure 6. Students' level of academic achievement. This figure illustrates student participants' self-reported level of academic achievement.

In terms of academic achievement, how good they think they are as students, students self-identified as 44.4% average, 25.4% excellent, 22.2% above average, 5.6% poor, and .8% very poor.

**Variables and measures.** The overall topic of the survey was the level of national identity identification perceived by 7<sup>th</sup> grade students in two Puerto Rican public schools. The survey collected students' demographic information (e.g. age, gender, perceptions of social class, and level of academic achievement) and captured students' responses to five Likert-scaled items related to PRNI (e.g. How Puerto Rican do you feel? How important is it to you that you are Puerto Rican?). Qualitative data collected in

sections and subsections above provided additional context to interpret the results. The questions addressed in the survey and findings are presented below.

*Feeling Puerto Rican.* The first question in the survey asked students, “How Puerto Rican do you feel?” This item served as a baseline to determine students’ feelings towards Puerto Rican-ness or Puerto Rican identity in general. The question measured whether students possess strong attachments to their national identity. About 68% of the students feel very Puerto Rican ( $N = 126$ ) ( $M = 6.34$ ,  $SD = 1.13$ , range 1 to 7). In sum, most students demonstrated a high level of awareness about feeling Puerto Rican and identified Puerto Rican national identity as part of their persona.

Table 5

*Feeling About Being Puerto Rican*

N	Valid	126
	Missing	0
Mean		6.34
Median		7.00
Std. Deviation		1.125
Variance		1.267
Range		5



Table 6

*Frequency Distribution: Feeling About Being Puerto Rican*

Valid	Frequency	Percent	Valid Percent	Cumulative Percent
2	2	1.6	1.6	1.6
4	11	8.7	8.7	10.3
5	12	9.5	9.5	19.8
6	16	12.7	12.7	32.5
7	85	67.5	67.5	100.0
Total	126	100.0	100.0	100.0

***Pride in being Puerto Rican.*** Pride as defined in this survey, implies a strong affinity for a specific nationality. Students showed a high level of pride that they were Puerto Rican (N = 126) (M = 6.43, SD = 1.01, range 1 to 7). Seventy-one percent (71%) of students reported to be “very proud” to be Puerto Rican. In fact, the frequency of responses suggesting that pride in being Puerto Rican is higher than any other response within the survey. In other words, students expressed a direct statement about national pride, suggesting its importance to them.

Table 7

*Pride In Being Puerto Rican*

N	Valid	126
	Missing	0
Mean		6.44
Median		7.00
Std. Deviation		1.016
Variance		1.032
Range		4

Table 8

*Frequency Distribution: Pride In Being Puerto Rican*

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	3	3	2.4	2.4	2.4
	4	6	4.8	4.8	7.1
	5	13	10.3	10.3	17.5
	6	15	11.9	11.9	29.4
	Very proud	89	70.6	70.6	100.0
	Total	126	100.0	100.0	

***Importance of being Puerto Rican.*** This variable directly answers one of the research questions: “How important is national identity for 7<sup>th</sup> grade students in Puerto Rico?” Indeed, the survey results suggest that national identity is very important to these students. Seventh grade students responded that PRNI is an element of importance to them (M = 6.40, SD = .95, range 1 to 7). Sixty-seven percent (67%) of students reported that being “Boricua,” another word for Puerto Rican, is very important. The mean score, research question two, will be addressed within the next section in this chapter.

Table 9

*Importance Of Being Puerto Rican*

N	Valid	126
	Missing	0
Mean	6.40	
Median	7.00	
Std. Deviation	.948	
Variance	.899	
Range	3	

Table 10

*Frequency Distribution: Importance Of Being Puerto Rican*

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	4	8	6.3	6.3	6.3
	5	17	13.5	13.5	19.8
	6	17	13.5	13.5	33.3
	Very important	84	66.7	66.7	100.0
	Total	126	100.0	100.0	

Finally, students embrace the idea of PRNI. The majority of 7<sup>th</sup> grade students enrolled in a social studies class in Puerto Rico: 1) feel very Puerto Rican (67.5%); 2) are very proud of being Puerto Rican (70.6%); 3) think that it is very important to be Puerto Rican (66.7%); 4) feel very happy about being Puerto Rican (65.1%), and 5) would feel very sad if someone said something bad about Puerto Rican people (32.5%). In addition, I converted students' overall responses into a Puerto Rican identity score (PRI score). This simple statistical procedure averages student responses to the survey. In general terms, students show a high level of identification with PRNI ( $N = 126$ ) ( $M = 6.37$ ,  $SD = .92$ , range 3.50 to 7)

Table 11

*Puerto Rican National Identity Score*

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	4	1	.8	.8	.8
	4	1	.8	.8	1.6
	4	4	3.2	3.2	4.8
	4	1	.8	.8	5.6
	5	2	1.6	1.6	7.1
	5	4	3.2	3.2	10.3
	5	3	2.4	2.4	12.7
	5	4	3.2	3.2	15.9
	6	5	4.0	4.0	19.8
	6	8	6.3	6.3	26.2
	6	3	2.4	2.4	28.6
	6	3	2.4	2.4	31.0
	7	10	7.9	7.9	38.9
	7	13	10.3	10.3	49.2
	7	64	50.8	50.8	100.0
	Total		126	100.0	100.0

Table 12

*Mean Value Of Puerto Rican National Identity Score*

Valid	126
Missing	0
Mean	6.37
Median	7.00
Std. Deviation	.916
Variance	.840
Range	4
25	5.75
50	7.00
75	7.00

As indicated in chapter three, I intended to contextualize findings identified through the survey by employing data collected through focus group interviews with students. The students’ opinions about PRNI provided the context to further understand the quantitative results.

**Qualitative Results**

A total of seven teachers and twenty students participated in the qualitative portion of this study. Teachers were divided into two focus groups. Students were divided into three focus groups, due to a larger number of student participants (see Table 4). These arrangements enriched the study, as they allowed me to recognize differences in teaching styles and to foster better relationships with the students.

Throughout this chapter, teachers’ insights reveal that the social studies class serves as a vehicle to imprint the Puerto Rican character on students. As stated by Mr.

Almeida: “Ellos llegan al séptimo grado para aprender a ser Boricua” [they come to 7<sup>th</sup> grade to learn how to be Boricua]. Students, on the other hand, expressed that the social studies class is important, but “bien aburrida” [truly boring]. Students repeated this statement throughout the focus group interviews. The relationships between teachers and students within the social studies classes are better understood as illustrated in *Figure 7* below.

Further examination of students’ nuances and expressions reveals that schoolchildren have multiple levels of connectedness with PRNI that transcend the social studies class. On occasion, students’ levels of connection with PRNI coincide with what is taught in the social studies class, but not as clearly as teachers perceived. In the same fashion, students’ levels of connection to PRNI do not always reflect social studies lessons. In other words, students do not use aspects of the social studies curriculum to shape ideas about PRNI. Nonetheless, students recognized the role of the social studies class in crafting PRNI, but implied that there is more to PRNI than the social studies class. In other words, students indicated that they learn about PRNI outside of social studies class.

Thus, throughout the chapter, I present occurrences where teachers shared their views on PRNI and how they described social studies as a class on Puerto Rican identity. In contrast, students’ views are presented as a significant component of the teaching and learning process of the social studies class. In other words, I use students’ voices to argue for better curriculum development, one that takes the subjectivities of the individual as a starting point for crafting PRNI.

**Observations.** I observed and explored the daily activities of the social studies

classrooms selected for this study. The observations allowed me to (a) gain a more profound understanding of what it means to be a social studies teacher in Puerto Rico, (b) how schooling impacts students' identity politics and (c) the interactions between these two elements. The presentation of these three themes will allow educators and experts in the field to reexamine how teachers teach the social studies class and encourage them to develop a content-rich curriculum that responds to students' identities in the classroom, and more interestingly, correlates with their lives outside the school.

Table 13

*Summary Of Common Themes And Nuances*

Common themes	Nuances
Teacher's views/National identity and pride	Curricular content develops students' sense of national identity and pride v. national identity develops through everyday things and special events.
Students' voice/PRNI as a construct	Being Puerto Rican is X, Y and Z (the curriculum and teachers ideas) v. Being Puerto Rican is a meaning-making process based on everyday life events.
social studies classroom Teacher-centered and student-centered curriculum	Prescriptive curriculum v. students appropriation of PRNI

In general terms, teachers felt distressed when students exhibited boredom towards their social studies classes. Mrs. Ortega, for example, expressed the following: "Si solo supieran lo importante que es esta clase para su futuro" [if they would only acknowledge the importance of this class for their future]. Teachers want students to value and love patriotic themes in their classes. However, the evidence discussed below centers on students' voices and differences between students' views on crafting an

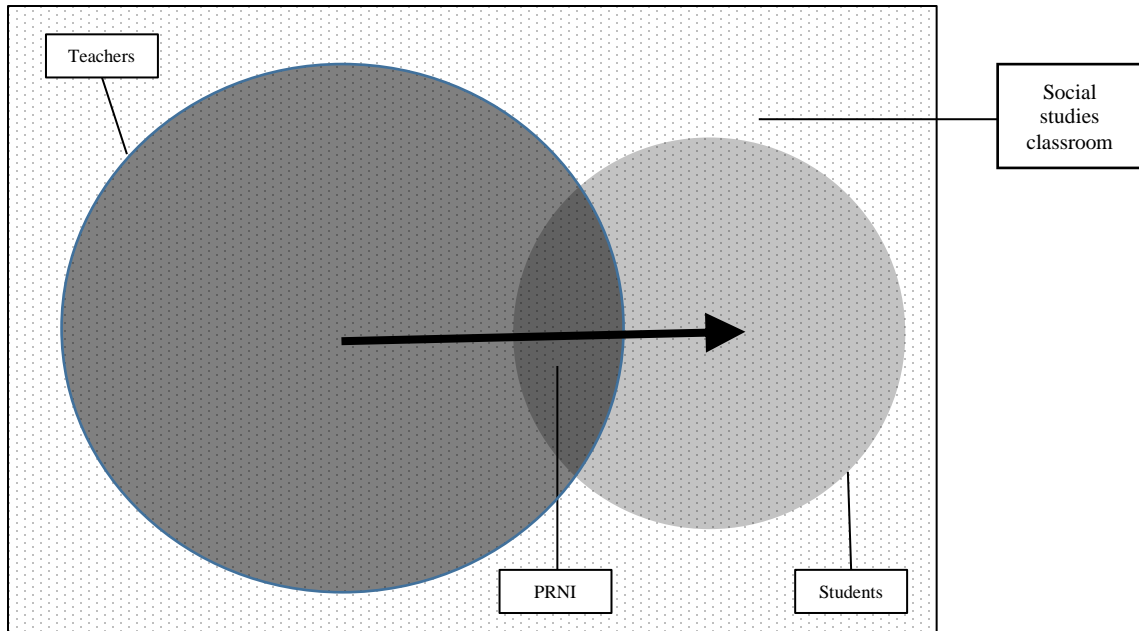
identity and what teachers expressed and carried out in the classroom. Consequently, themes extracted from the data indicate that 7<sup>th</sup> graders may or may not rely on topics discussed in the social studies class to form ideas about national identity. Students draw on the social studies classes for academic purposes, less so for crafting their sense of national identity. Furthermore, the formation of a national identity, more often than not, is reinforced outside the classroom through multiple variables. Teachers may see themselves as the focal point of identity in the classroom when, indeed, that is not the case at all.

*Teachers' views.* Figure 7 illustrates how teachers envision the delivery of social studies classes in Puerto Rico. The light-shaded circle represents the students, whereas the dark-shaded circle represents the teachers. The social studies classroom is the arena where both teachers and students merge curricular content with both teacher and student voices. Teachers presume that students know little about being Puerto Rican and need to be instructed on the notion of Puerto Rican-ness. Teachers' notions and beliefs suggest a unidirectional instructional approach where they instruct students about PRNI. Likewise, teachers see the social studies class as a place where students come to learn about PRNI. Subconsciously, they dismiss what students bring to the classroom. In other words, teachers see themselves as the focal point of identity and believe that they must teach students how to be Puerto Rican.

The diagram below represents the dynamics of the social studies classroom. The illustration depicts teachers' knowledge of PRNI and how they believe it should be imprinted into students' minds. PRNI becomes shared by teachers and students in the classroom. Since 7<sup>th</sup> graders experience stages of identity development different from



adults, their systems of belief are malleable and more susceptible to change. Since teachers expressed that the social studies class teaches PRNI, the diagram represents how teachers craft PRNI. According to the teachers, the 7<sup>th</sup> grade social studies curriculum teaches students about Puerto Rican history, cultural traditions, and what makes Puerto Ricans unique. Students insisted that, although important, the social studies class is



*Figure 7.* A Venn diagram illustrating teachers' vision on how the social studies class crafts PRNI. The classroom, represented in the background, provides the setting for students and teachers to debate about PRNI.

peripheral in the crafting of PRNI as it relates to how students perceive everyday events in the development of a national identity. PRNI is in solid grey in the diagram between teachers and the students. PRNI becomes a negotiated construct in the space between students and teachers. In synthesis, the 7<sup>th</sup> graders who participated in this study believe that national identity consists of more than what was taught in the social studies classes. I will discuss repeating ideas and themes that seemed most meaningful to this research as

they relate to students' crafting of PRNI.

*A veteran teacher.* Entering Mr. Almeida's classroom felt, in a sense, unnatural. I entered the classroom assuming the role of a researcher carrying out the mechanical aspects of collecting data. I identified the themes associated with PRNI in social studies classes with a more comprehensive lens. Mr. Almeida, a veteran teacher with over thirty years of teaching experience, is well known at the school for having a commanding presence and excellent control of the classroom. He welcomed me, but seemed a bit hesitant to let me audiorecord the class. Expressing concern, Mr. Almeida stated: "Yo no quiero que el departamento me esté carpetiando," and after looking down for a few seconds, he insisted: "pero yo digo lo que tengo que decir" [I don't want the Department of Education to be profiling me, but I say what I must]. I took this opportunity to reinstate that I was a fellow social studies teacher, and as such, I wanted to know what he was teaching about PRNI. Then, he got excited and said: "Mi clase de lo que se trata es de la identidad puertorriqueña... ya verás" [My class is all about Puerto Rican identity... you will see].

I believe Mr. Almeida's initial reactions to my intent to research his class comes from his experience of being an *independentista*, someone who believes in independence for Puerto Rico. Pro-independence Puerto Ricans have experienced a long and painful trajectory of persecution and oppression that has been documented through the work of scholars and pro-independence leaders (Albizu Campos, 2012; Bosque Pérez, & Colón Morera, 2006; Cancel Miranda, 1998; Mari Bras, 1984). Discussions on how the federal government has profiled independentistas in the island awakens passionate political, intellectual, and civil rights debates among Puerto Ricans. Perhaps, those debates help

explain Mr. Almeida's initial reaction. Furthermore, Mr. Almeida has been a teacher union representative for *La Federación de Maestros*, a local teachers' union with a strong media presence. The union has led several teacher strikes for better working conditions.

In his social studies class, Mr. Almeida delivers specific discourses of PRNI. He consciously attempts to define a Puerto Rican identity, distinct from an American one. Reinstating that being Puerto Rican is different from being American, Mr. Almeida depicts being Puerto Rican as: (a) loving and learning about that which is ours and (b) identifying that "which does not belong to us". In that sense, being Puerto Rican for Mr. Almeida is incongruent with being a U.S. citizen. For example, when asked about the meaning of the social studies class, he stated:

Por eso es que desde agosto yo les digo a los estudiantes que esta clase que nosotros ofrecemos es una clase sobre la puertorriqueñidad, es una clase sobre enseñarles a ellos a sentir aprecio, a sentir amor y a sentir orgullo sobre lo que significa ser puertorriqueño

[That is why since the beginning of August, I tell students that this class we offer is a class about Puerto Rican-ness, it is a class about teaching them to feel appreciation, to feel love and to feel proud about what it means to be Puerto Rican]

On the other hand, during an informal conversation with Mr. Almeida, he shared with me that some students celebrated Easter. The students asked him for permission to decorate his classroom door. Mr. Almeida's response was profound:

Yo dejé a las nenas de mi salón que decoraran la puerta con motivo de Pascuas, pero ¡ah! eso sí, les dije que no quería nada americano en mi puerta, nada de huevitos, ni de conejitos, ni de nada de esa porquería americana que tenemos.

[I allowed the girls in my class to place Easter decoration on my classroom door, but hey! I told them that I did not want any American Easter decoration like the Easter eggs or the Easter bunny, none of that American crap]

According to Mr. Almeida, part of his views are linked to the Americanization

process that took place during the early twentieth century, when schools in Puerto Rico indoctrinated students with American customs and traditions. Mr. Almeida stated:

...ese libro lo que hacía era trastocar todos los valores de lo que era la historia de Puerto Rico, de lo que eran los valores puertorriqueños, de lo que es ser un buen puertorriqueño, de lo que implica la puertorriqueñidad.

[That book distorted all the values about the history of Puerto Rico, those that were Puerto Rican values, what it is to be a good Puerto Rican, what it implies to be Puerto Rican.]

Mr. Almeida is referring to Paul G. Miller's book (1922), *Historia de Puerto Rico*. The book was employed to initiate the training of local teachers following the end of the Hispano-Cuban-American War. Allen I. Whohl (1978) describes Miller's work as follows: "it remained the official history textbook until 1948" (p. 78) and carried an imperialistic view, which indoctrinated teachers-in-training from its publication in 1922 to 1948. Mr. Almeida expressed several times his resentment for the Americanization process.

*The Social Studies class neglected.* Social studies teachers from both research sites expressed concern that social studies classes have been neglected in Puerto Rico. The teachers asserted that the Department of Education no longer considers the social studies class as important as it once was. Compared to other subjects, such as Math and Science, the social studies class has become unimportant at the elementary, middle, or high school levels. On one hand, the teachers believe that at the elementary level, teachers use the social studies period for resting. The teachers participating in the study said that elementary school social studies teachers used the social studies class to reduce the rigor of other classes and filled the period with passive work (e.g. using the textbook to answer chapter questions, summarize chapters.). Additionally, they explained that 7<sup>th</sup>

grade students come to the social studies class with lacking enthusiasm, due in part, to how the Puerto Rico's Department of Education has neglected the social studies class. As Mr. Almeida puts it, "Todos los huevos están en la canasta de las ciencias y las matemáticas," which is a colloquial expression to suggest that math and science receive the greatest amount of resources, mimicking the American instructional model known as No Child Left Behind.

Other teacher participants have similar ideas to those of Mr. Almeida. Teachers Irving and Garcia suggested that students do not know much about PRNI because of how social studies class is taught at the elementary level. For instance, they suggested that: "Bueno, ni en las pruebas puertorriqueñas se evalúan los Estudios Sociales, entonces esa misma mentalidad los mismos muchachos se dan cuenta" [Well, students are not even tested in social studies in the Puerto Rican standardized test, and the students notice that]. Essentially, teachers complained about how fellow teachers at the elementary level do not take the social studies class seriously. In contrast, 7<sup>th</sup> grade social studies teachers believe that with regard to PRNI, "entre más pequeños, mejor es" [the younger the kids, the better]. Their comments suggest that 7<sup>th</sup> grade social studies teachers feel the need to remedy the elementary teachers' neglect of the social studies class.

*Pedagogy.* Teacher participants indicated that the 7<sup>th</sup> grade social studies class offers the perfect place to teach and learn about PRNI. They employed specific pedagogical practices to ensure that students comprehended certain themes of PRNI. Teachers expressed notions of the ideal social studies class, as well as their hope to engage students' intellectual curiosity. The interviews revealed that teachers rely on array

of pedagogical strategies to deliver concepts of PRNI in the social studies classroom. Nevertheless, an isomorphic relationship exists between what teachers want the social studies class to be and what actually takes place in the classroom.

In general, this study reveals that teachers deliver specific discourses of PRNI in their social studies class that consciously or unconsciously refer to Puerto Rican-ness and Puerto Rico's relationship with the United States. These discourses, primarily, come from the teacher as the carrier of the pedagogical process in the classroom. Both the observation of classes in session and focus groups interviews with teachers revealed that a distinction exists between what teachers believed should be taught in the classroom regarding PRNI, the curricular content dictated by textbooks and curriculum guides, and what students expected from the social studies class.

*Students' voice.* Focus group interviews with students provide the context to further understand the data collected. The survey reveals students' strong feelings about their national identity and unveils students' self-awareness about being Puerto Rican. Students are aware of their national identity at their current age. Variables such as gender, socioeconomic status, and level of academic achievement have no significant impact on students' appreciation for the concept of PRNI. In fact, students' views collected through the qualitative portion of this study corroborate findings gathered through the survey in which students strongly identify with PRNI.

In general, students expressed satisfaction in the survey because, in their own words, the survey reassured them that they could have pride in their identities. When they talked about answering the survey questions, students indicated that they found it easy:

“Me sentí bien al responder esas preguntas porque me preguntaba sobre cómo yo era” [I felt good about answering those questions because they were inquiring about who I am]. This response shows the enthusiasm that 7<sup>th</sup> grade students felt while answering the survey. However, student responses also highlighted several themes pivotal to this study. For example, students (a) expressed dissatisfaction with the social studies class, (b) manifested a strong feeling of belonging to the Puerto Rican nation, and (c) itemized markers of Puerto Rican identity. Students’ voices became a major component of this research study and formed the starting point for further research and recommendations.

*Dissatisfaction with the social studies class.* While examining teachers’ views on the social studies class, teachers presented a legitimate concern about students’ understandings of PRNI. Seventh grade teachers described the social studies class at the elementary level as vague and superficial, whereas the 7<sup>th</sup> grade social studies course is a class on Puerto Rican identity. They thought that social studies should be a more profound class with content-rich opportunities to further examine the concept of Puerto Rican-ness. Moreover, teachers indicated that they made a great effort to try new pedagogical strategies and focus on current events. However, students perceived the 7<sup>th</sup> grade social studies class differently. Throughout the interviews, students emphasized the aspects of the social studies class that they value and those that they feel need improvement. As consumers of an educational product, students’ statements represent suggestions for improvement rather than irreverent criticism. By making students’ statements available for scrutiny by teachers and individuals with interest in improving the delivery of social studies classes, I aimed to trigger a discussion on how teachers

deliver concepts related to PRNI.

Students felt resentful of pedagogical strategies that fail to encourage debate or foster a learning community among their peers. When asked to describe a typical day in a social studies class classroom, a student said: “se trata todo de leer el libro, escribir, no sé, el maestro explica” [it is all about reading, writing, I don’t know, the teacher discusses stuff]. Another student indicated that: “los estudios sociales no era tanto copiar en la libreta, como ahora” [the social studies class, it wasn’t like writing in the notebook all the time as it is now]. Essentially, students disapprove of being required to answer a large number of questions based on class readings. Additionally, their disappointment shows when they express that: “el maestro no nos habla lo suficiente para nosotros aprender porque todo se basa en escribir” [the teacher does not talk to us enough, so we can learn something, everything is about writing]. Another student argued in a satirical way for taking a break when he stated: “mano, que nos den un ‘break’ porque todo es escribe y escribe” (dude, they should give us a break because is all about writing and writing). Students understand teachers’ pedagogical strategies and how such strategies impact their motivation to learn about PRNI. *Innovation* in teaching the social studies class is key to



the understanding PRNI. Is there an app for national identity?



Figure 8. Frederick Deligne (2010) “There’s no app for that”. A comic to illustrate millennials’ way of thinking. Retrieved from <http://archive.signalscv.com/archives/33129/>

Students expressed concern for the lack of technology in the classroom. When asked about it, Jason stated: “preferimos la tecnología” [we prefer technology].

Furthermore, the student indicated that he could be a better student if he had more opportunities to use technology in the classroom, as technology allows him to finish his projects more quickly:

...es verdad porque si fuera con enciclopedia tardas más. En Wikipedia tú lo buscas, en Google; todo lo puedes ‘gugulear’, y entonces dices, ¡ah! yo tengo dudas en esto y lo buscas

[...it is true because if you use an encyclopedia it will take you longer. With Wikipedia you search for it, with Google; you can Google everything, and then, ah! I might have questions, and then you search for it].

The use of technology in the classroom or the lack of thereof impacts how

students perceive the social studies class, and therefore, PRNI. Cellphones, computers at home, role playing games (RPG), and social media, compete for students' attention and interests. Thus, the lack of technology in social studies classes encourages the students to equate the social studies class to being old-fashioned and out-of-date. Students' level of concern with the employment and integration of technology into the classroom suggests that the social studies class needs a long overdue update. Yet, given the heavy use of textbooks in the classroom, teachers have pressed the "remind me later" button and have postponed, intentionally or unintentionally, the enrichment of the social studies class through the use of technology. As Jason stated, "si sólo usamos el libro, pues no me gusta" [if we only use the textbook, I don't like it].

Focus group interviews with students reveal their interest in social media. Discussions about the use of technology in the classroom allowed students to admit that they spent too much time on social media, especially Facebook. According to the students, staying in touch with fellow classmates after school is, "really cool," particularly when they discuss situations that emerged throughout the day. For example, after complaining about the constant use of the textbook in the social studies class, Jason stated:

"Acho mijtel es que uno está loco por salir del salón. Llegar a casa, comer, tiro el bulto en una esquina y me voy a correr bicicleta. Me voy pa' la cancha, me llevo el teléfono y me pongo a chatear un rato en Facebook, uno ve un montón de cosas de deportes y de video divertidos y eso, y pues, cuando llego a casa, pues ya es tarde y no estudio"

[So Mister, you can't wait to get out of the classroom. I get home, I eat, I throw my bag in a corner and I go out with my bike. I go to the basketball court, and with my phone I chat for a while on Facebook, you are able to see a lot of things related to sports and funny videos, and more, and even so, when I get back home, it's kind of late, so I go to bed.]

The effect of social media on student national identity, as opposed to the classroom discussions, is closely related to the use of technology inside or outside of the classroom. Although Jason's daily routine lacks academic rigor, his socialization process reflects his ability to access social media. The social studies classrooms in both research sites lacked wi-fi and computers. As cell phones are not allowed in the classrooms, students "can't wait" to get out of school to access social media and make use of technology. Jason's statement suggests that he accesses a variety of socio-cultural elements through his cellphone that are unavailable at school. In fact, during the research study, students from research site #2 visited the school library twice. Students from research site #1 did not go to the school library.

Accessing social media impacts students' identities (Ganda, 2014). In fact, we use social media as an "extension of everyday life and a tool of cultural change" (Singh, 2010, p. 86). In national identity and social studies classes, restraining students' access to technology not only impacts their interest in the social studies class, but also invites students to search for resources to inform their identity development outside the classroom. The crafting of PRNI starts the moment the student enters the classroom. The way students feel when they enter the classroom determines what pedagogical strategies may enhance the delivery of the social studies class, and furthermore, the awakening of national identity. When asked about how they feel about the social studies class, Raquel responded:

...cuando llego al salón me siento en la silla y lo primero que veo son dos pizarras llenas y uno se queda como que... Entonces, eso es otra cosa, el mijtel no explica bien porque cuando tú le preguntas algo, hay mira, mira, y entonces, este, porque él coge como que algo personal, espero que esto de verdad sea confidencial"

[...when I get to the classroom, I go to my student desk and the first thing I see is the blackboard full of stuff to write on the notebook, and you just feel like... Then, that's another thing, the teacher does not explain things well because when you ask him something, look, look, he then takes everything personal, hopefully this stuff is confidential]

The student asked for reassurance on the confidentiality of her comment, which reveals a legitimate concern and suggests poor rapport between the teacher and the students. As indicated above, one major complaint extracted from students' interview transcripts refers to poor pedagogical strategies. Although the statement above might be seen as the voice of a singled-out student, many students' comments coincided with Raquel's statement. In fact, Sergio, a student from research site #1, suggested that the social studies class needs to be more "divertida," [fun or entertaining] as he acknowledged that sometimes he falls asleep in class. Sergio demonstrated how he has reflected on the social studies class by elaborating on his expectations of the social studies teacher, the teacher's duties, and responsibilities:

...[E]l maestro es importante porque tiene que tratar de explicarte bien, que tú entiendas y eso, y tiene que saber para que tú sepas los orígenes que se han dado en Puerto Rico.

[The teacher is important because he has to try to explain things to you, so that you can understand, and stuff, and he has to be knowledgeable so that you know Puerto Rico's origins]

Another student from research site #2 was harsher in describing his feelings about the social studies class. Once again, poor pedagogical strategies emerged as a common theme in students' responses. When asked to describe a typical day in the social studies classroom, Eric stated:

"todo es escribir, escribir, escribir, lee, escribir y estar aborreció. Entrás, coges el libro, te sientas, abres la libreta copias. Para mí eso es basura."

[everything is writing, writing, writing, reading, more writing and you become overwhelmed. For me, that is garbage.]

However, one of Eric's peers noticed how harsh he was when answering the question and, in an apparent effort to ease his classmate's statement, he said:

"...Mijtel Díaz, ayuda a leer el libro, pero es una rutina de siempre, llegas, te sientas, abres la libreta, busquen el libro, la página esta, leer esto..."

[...Mister Díaz, it helps me to read the book, but it is an everyday routine, you arrive, you get seated, you open your notebook, you get the book, look up the page, read this...]

As has been noted above, students resent how the social studies class is delivered.

The daily routine of the social studies class is boring and, in my view, does not help the development of a complex national identity and critical thinking skills. On the contrary, given what the students articulate, middle school social studies teachers conduct their classes like elementary teachers do in their classrooms. Students did not hesitate to point out the things that are not working for them in the social studies class, even though what they have to say might not be politically correct for a twelve year old. Their comments revealed that although students develop a sense of national identity, they do not do so in the social studies classroom as I originally expected, but somewhere else.

*Belonging to the Puerto Rican nation.* The quote at the beginning of this chapter is, in my opinion, the most powerful statement of how students feel about being Puerto Rican. It not only carries a meaning and a sentiment of dissatisfaction with the current state of affairs on the island, but also a sense of pride that resides in the collective consciousness of the Puerto Rican nation, that is "yo soy puertorriqueño aunque naciera

en la luna.”<sup>19</sup> Hence, the student expresses that being Puerto Rican transcends the localized identity of the archipelago’s boundaries. At least in the mindset of this student, things can be wrong on the island, yet he still will be Puerto Rican, no matter what.

On one hand, students are proud of their identity and heritage. They like the fact that most of the knowledge they have about being Puerto Rican comes from their parents and grandparents. They expressed discontent about how crime and poverty affects the island and are self-aware of the decline of Puerto Rican society, for example when one student said: “las cosas están malas, mijtel Díaz” [things are bad, Mr. Díaz]. While expressing these feelings, students acknowledged the transformations taking place on the island and the mainland: how their families and friends are leaving the island and relocating to the mainland, searching for better job opportunities and quality of life. Thus, migration is redefining the geography of the Puerto Rican nation, its ethos, and, more importantly for students, family ties. For example, when describing his first experience traveling outside of Puerto Rico, Raymond, a student from research site #1 indicated that:

...yo fui a Disney, a Epcot, nos quedamos en la casa de un amigo de mi tío, familiar creo que era, y yo lo escucho de mi tía, los hijos de ellos hablaban inglés, que yo tenía que hablarles en inglés y mi tía me enseñó hablar inglés. Siempre tenía que hablar inglés.

[...I went to Disney and Epcot, and we stayed at my uncle’s friend house, I think this man is my relative, and listen to my aunt and my cousins speaking in English, and I had to speak English, and my aunt taught me how to speak in English].

Given the massive number of Puerto Ricans relocating in central Florida, near the Kissimmee and Orlando area, it is unsurprising that the student makes reference to

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<sup>19</sup> This is a phrase extracted from a popular Puerto Rican song, *Puerto Rican on the moon*, composed by Roy Brown. The phrase means *I’d be Puerto Rican, although born on the moon*.

language to describe his relationship with his cousins and aunt. I can relate to this experience, as I also had monolingual cousins in central Florida who did not speak Spanish. During the 1990s, I visited my cousins several times and language became a barrier between us, as none of us were bilingual. Thus, language weakened family ties.

Raymond reflected on how he was able to “meterle al inglés” [to tackle down English], as if language mastery would allow him access to specific transactions with his own family. Perhaps he remains aware of a liminal identity that is not contradictory; speaking English in Orlando with his Puerto Rican relatives does not make him less Puerto Rican. Along with Raymond’s comment, Rosy discussed the benefit of being bilingual and the fact that Puerto Ricans are U.S. citizens. “Es un beneficio,” she said. Likewise, in reference to Puerto Rico becoming a state, a Sarah avidly said: “...seríamos mejor si fuéramos estado” [we would be better off if we would be a state]. On the flip side, during this same conversation, another student responded to his classmates and said regarding potential statehood: “Eso afectaría nuestra definición de ser puertorriqueño” [that would affect our definition of being Puerto Rican]. These statements suggest that students are aware of the political debates occurring on the island. The outcomes of political debates and the relationship of Puerto Rico with the United States affect students. In fact, they live this experience everyday as their relatives, neighbors, and friends leave the island at an alarming rate.

*Markers of Puerto Rican identity.* In general terms, students defined national identity as “lo que es de uno, lo que eres tú, lo que te describe, tus características” [what belongs to you, who you are, what describes you, one’s characteristics]. This statement

reflects Mr. Almeida's notion about the social studies class when he describes the class as a course on PRNI and "that which is ours" (See the section on Veteran Teacher above). For students, some specific markers of identity make Puerto Ricans unique. For example, place of birth, language use, and Puerto Rico's relationship with the U.S. differentiates Puerto Ricans from other nationalities. This knowledge, according to students, is not the result of schooling. Schooling helps them learn about the history of Puerto Rico, but student participants identified heritage, or cultural legacy, as the key factor in crafting their national identity. Students depict this concept of cultural legacy their relationships with parents and, more specifically, with grandparents. As Stephanie stated, "...quienes somos, los aprendimos de nuestros papás y de nuestros abuelos" [Who we are, we learned it from our parents and grandparents].

Thus, students' notion about place of birth and language use transcends the geography of the island and the political weight associated with the use of English or Spanish. Perhaps their ideas are due to the lack of social studies and historical knowledge about the political struggles Puerto Ricans have experienced through their colonial trajectory, first with Spain and later with the United States. However, for students, being Puerto Rican constitutes the recognition and celebration of a heritage that has been transmitted for generations. For example, Stephanie suggested that she is Puerto Rican because of her parents and grandparents. For her, grandparents possess a level of understanding about Puerto Rican-ness that differs from what she conceives as Puerto Rican. She recognizes differences in how her grandparents dress, the folkloric music they listen to, but above all, their collection of life experiences unique to Puerto Rican elders.



Based on Stephanie's statement, being Puerto Rican is also a subjective experience based on generational beliefs:

...los abuelos tú los ves bien vestidos, con sus guayaberas, y se pasan escuchando música de viejos y tú te quedas como... Yo entiendo que a las personas mayores si tú le preguntas ahora cuán puertorriqueño tú te sientes, ellos te van a decir 100% porque ellos vivieron cada experiencia que ahora mismo en la época que estamos nosotros no se ven. Ahora no, ahora todos los juegos son electrónicos, no leemos cuentos, no discutimos la cultura de nosotros, son cosas diferentes que no se ven, ni se discuten

[...you see grandparents well dressed, with their guayabera, and they spend most of their time listening to music for old people, and you are like... I understand that if you ask old people now how Puerto Rican do you feel, they will respond that they feel 100% because they have lived such experiences in life that right now, during this time, you are no longer able to live them yourself. Right now, everything is electronic, we no longer read books, we do not discuss our own culture as kids, they are different things that people over look and are not even discussed.

Thus, if being Puerto Rican is defined in terms of subjective generational beliefs, the ability to identify external elements outside Puerto Rican culture is also subjective. For instance, what are students' ideas on the things Puerto Ricans do that identify them as Puerto Rican? And more importantly, what makes Puerto Ricans different from other nationalities? When asked about how important it is for Puerto Ricans to demonstrate who we are, Juan made reference to the concept of 'otherness', that is "los gringos, la gente de allá" [The gringos, people from over there], and stated that:

"...hay que enseñarle a esa gente nuestra comida, la cultura, como hablamos, como vestimos, la música, todo."

[...we have to teach those people our food, the culture, how we speak, our clothing, the music, everything]

This statement outlines two things: (1) Juan makes a clear distinction between Puerto Ricans and "los gringos," and (2) it is not until we are able to contrast the

differences between two national groups that individual traits fully emerge. The latter relates to Mikhail Bakhtin's idea about how meaning develops: "It is only in the eyes of another culture that foreign culture reveals itself fully and profoundly." Juan's notion of otherness reveals his uniqueness as Puerto Rican, manifested in the necessity to teach 'those people' who we are. Do Puerto Ricans need to validate themselves as individuals in front of the gringos? For Juan, the answer is yes, because differences exist between being Puerto Rican and being 'gringo'. I believe that the emotional charge through which Juan expressed himself reveals a slight, but insightful understanding of colonialism, related to colonized subjects validating themselves to the colonial power. Precisely, the validation of our own national identity resides in the ability to recognize our cultural characteristics and to live them fully without restrictions of geography or politics.

Students engaged in a more concrete debate about Puerto Rico's relationship with the United States. In response to several prompts related to PR-U.S. relations, students talked about specific things they liked and disliked about the commonwealth status and how everyday doings impact our identity. In fact, during the interviews with students, I witnessed how they debated among themselves over issues of national identity, statehood, and language use. For instance, when asked about Puerto Ricans being U.S. citizens, Frank suggested that he feels good about being a U.S. citizen:

"...bueno, yo me siento bien porque por ellos tenemos mejor economía porque si ellos no hubieran montado sus compañías y nosotros no hubiéramos tenido chavos para montar nuestras compañías. Yo creo que no estuviéramos ni vivos y gracias a Estados Unidos nosotros comemos, vamos a la escuela, porque ellos nos dan chavos..."

[...well, I feel good because thanks to them we have better economy because if they would have not opened up their companies, we would have not have enough

money to open up our own companies. I think we wouldn't be alive, and thanks to the U.S. we eat, we go to school because they give us money.]

Rosy reacted in a more specific way when she suggested that Puerto Rico would be a better place if the island becomes a state:

“...sería mejor si fuéramos estado. Si yo me voy a Estados Unidos, me borro a Puerto Rico de la mente porque es mejor económicamente. Por ejemplo, en el pueblo siempre hay basura, las calles no están tan bien que digamos. Si somos estados, tal vez haya más seguridad, Puerto Rico fuera más bonito.”

[...it would be better if we become a state. If I go to the U.S. I will delete Puerto Rico off my mind because the U.S. is better in terms of the economy. For example, in the city there is trash, the streets are in bad shape. If we become a state, maybe there will be more security, Puerto Rico would be prettier.]

Rosa described how she feels about statehood and brought up concerns related to the economy of the island and the cleanliness of her neighborhood. Rosy suggests that statehood might provide Puerto Ricans with a better quality of life, including, public cleanliness and a better economy. Ronaldo, on the other hand, replied that statehood would be bad for Puerto Rico, because “los gringos hablan mal de nosotros” [gringos talk bad about us]. Ronaldo's statement provoked some impulsive feelings among students, including anger and frustration. Students coincided that they get angry and disappointed when they hear someone say something inappropriate about Puerto Ricans. For example, when asked about how they would feel if someone would say something bad about Puerto Ricans, a student said: “me enfogono” [I get pissed off]. Another students stated that: “Yo soy puertorriqueña, y no me gusta que hablen mal de Puerto Rico” [I am Puerto Rican, and I do not like people saying bad things about Puerto Rico]. Nonetheless, Rosy took the word again and suggested that:

“...algunas personas juzgan a los puertorriqueños por la criminalidad y todas esas

cosas malas como que salen en Youtube como la droga y el vicio y eso hace que no nos quieran. A mí me da coraje pero es que hacemos las cosas mal. Tiramos la basura, no limpiamos la calle y todo es un revolú. Ni siquiera cuidamos a las playas ni cuidamos el campo...”

[...some people judge Puerto Ricans because of the crime and all the bad things that they show on Youtube, like drugs and addiction, and that is why they dislike us. I get mad, but the truth is that we do not do things right. There is garbage all over the place, we do not clean the streets, and everything is a mess. We do not even clean up after we go to the beach and the rural areas...]

Students discussed the matter and agreed that people shouldn't judge Puerto Ricans based on the actions of a few irresponsible citizens. However, this debate among students becomes powerful with Rosy's notion about how statehood might make things better for Puerto Rico. Furthermore, she insisted that even if Puerto Rico becomes a state, “como quiera nos llamamos Puerto Rico y vamos a estar en Puerto Rico” [we will still be called Puerto Rico, and we will still be in Puerto Rico]. Thus, Rosy's statement transcends traditional ideas associated with identity politics in the literature and suggests the negotiation of meaning in terms of a cultural identity vis-à-vis a political identity. Rosy discerned between the two constructs.

Debates among students in regards to PR-U.S. relations suggest that colonialism shapes student perceptions about national identity. Colonialism emerged from the language students used: “Los gringos no nos quieren. Nuestras calles no están limpias, la de ellos sí, nosotros tenemos mucho crimen, ellos no, también le pertenecemos a ellos” [The ‘gringos’ do not like us. Our streets are not clean, their streets are clean, we have a lot of crime, they do not, also we belong to them]. Students' statements suggest that they recognize Puerto Rico as a territorial possession of the United States. Students extracted this knowledge from the social studies class:

“...a ellos le pertenece casi todo, como El Yunque. Lo que no me gusta es que algo cultural de Puerto Rico pertenezca a ellos. Esto yo lo aprendí de la clase de estudios sociales cuando el maestro habló del libre asociado, que sé yo”.

[...almost everything belongs to them, like El Yunque. What I dislike is that something that is part of the culture of Puerto Rico belongs to them. I learned this in the social studies class when the teacher discussed the commonwealth, I don't know.]

Students did not like the notion of being someone else's possession. When discussing Puerto Rico as a territorial possession, students' sense of national identity and pride emerged. Jessenia, for example, expressed dissatisfaction with the current colonial condition:

“...todo los que nosotros tenemos es de Estados Unidos y pues, yo quisiera, casi toda, la mayoría, por lo menos el 50 o el 90% que tengamos de nuestras cosas y de nuestros bienes que sea de Puerto Rico, que sea hecho acá, que se fabrique acá.”

[...everything that we have belongs to the United States, almost everything, most of things, and I really would like that 50% or 90% that we will have our own things, and that our goods are made and produced here].

Students acknowledge Puerto Rico's colonial condition. Such recognition uncovers elements of national identity and pride. However, their discussions illustrate the quote at the beginning of this chapter: “Yo me siento puertorriqueño, pero no me gusta Puerto Rico.” As discussed in the review of the literature, elements of PRNI are negotiable. In other words, besides being contextual, as Barrett (2007) suggests, national identity is also transactional; students are engaged with sociocultural transactions. This premise is key in identifying markers of identity, as the current territorial condition provokes diverse reactions towards PR-U.S. relations, even among 7<sup>th</sup> graders. Moreover, such statements need to be seen in the context of the many Puerto Ricans leaving the island. Children at the 7<sup>th</sup> grade level recognize why people are leaving and understand

how migration impacts the definition of national identity. When children leave the island, new transactions emerge, which redefines national identity.

Place of birth also emerges as a marker of Puerto Rican identity. When asked what makes Puerto Ricans unique, students suggested place of birth as determinant. One student said that what defines being Puerto Rican is precisely being born in Puerto Rico: “sí, porque es el lugar donde nacimos” [yes, because it is where we were born]. Based on this analysis, place of birth, although important for the configuration of national identity, becomes unimportant for students if, as Duany would suggest, the nation is on the move.

*Sports.* Puerto Ricans in the Olympics, the Puerto Rican national basketball team, Puerto Rican boxers, such as Félix “Tito” Trinidad and Miguel Cotto, show how sports influences PRNI. Teachers expressed that their classes become animated when they discuss sports in the social studies classroom. In fact, Mr. Iglesias suggested that through sports, he more effectively engages students in class:

“Otro elemento que he usado mucho es que ellos se sienten bien puertorriqueños cuando vemos al equipo nacional de baloncesto”.

[Another element that I have used is that they (the students) feel very Puerto Rican when we watch the national basketball team]

On May 15th, 2012, boxer Miguel Cotto faced Floyd Mayweather, Jr. for the WBA (Super) Light Middleweight/Super Welterweight belt. After twelve rounds, Mayweather won the fight. Yet, according to Mr. Iglesias, “ellos querían que Cotto ganara la pelea. Ahí sí se veía el sentido de patria y de puertorriqueño” [They wanted Cotto to win the fight. Right there you see a patriotic and Puerto Rican sentiment].

*The social studies class.* Teachers possess their own style and delivery strategies (Gabriel, 2005; Mohanna, Chambers, & Wall, 2016). Teacher participants used several instructional strategies throughout the observation portion of this study. They exhibited a recurring pattern. Their strategies were cyclical in that teachers used them randomly, yet one strategy led to another. Rather than entering the classrooms to criticize teachers' methods, I wanted to gain their trust. I also wanted them to perceive me as a colleague and not as an evaluator. Thus, my focus was on answering the research questions, rather than criticizing my colleagues. As indicated in Chapter 3, I adopted an observer-as-participant role to identify what teachers do in their classrooms. I centered my attention on the delivery of the social studies class and teachers' voices.

Teachers exhibited recurrent pedagogical strategies in their social studies classes. These strategies impacted students' interest in the social studies class and how students crafted PRNI. Teachers relied upon three basic strategies: (a) lecturing, (b) reading-explanation, and (c) writing in the notebook (see *Figure 9* for further details). They used dictation to define concepts and terms. The teacher read out loud class material and students copied in their notebooks. Reading-explanation assisted the teacher with a platform to follow: the textbook. The teacher asked students to read out loud, making necessary interruptions to further elaborate on what the students read. Writing worked as an instructional strategy when students needed to record class material that teachers considered important. Teachers eventually used this material for formative and summative assessments. Thus for teachers, *la libreta*, as they called it, represented a grade, based on the amount of class material students recorded in their notebooks. For example, on one occasion, Mrs. Ortega in an intimidating tone, called the class to

attention: “Vamos a sacar la libreta, hoy voy a corregir libretas.” [Let’s take the notebook out, today I am grading the notebooks.] The emphasis on the notebook was evident when Ortega reiterated the importance of the notebook: “Edwin, ¿terminaste? Yo voy a ver las libretas, y voy a dar puntos, porque esto va para las notas del viernes. Ustedes deciden.” [Edwin, did you finish? I am going to look at the notebooks and grade them because this is going on your report card on Friday].

A cycle of instruction repeated among social studies classes when the teacher relied on the previous instructional strategies. For example, when describing Caparra as a Spanish colonial settlement in Puerto Rico, Mr. Almeida stated: “Vamos a definir ese concepto de minería” (Let’s define the concept of mining). Then, he defined minería for the students. During the same class period, he asked students to take notes on the characteristics of Vicente Yañez Pinzón, a Spanish conquistador who introduced cattle to the island. The teacher discussed these characteristics, while students took notes in their notebooks. Mr. Ramírez, on the other hand, when teaching about La Casa de Contratación [The House of Trade], a Spanish agency that collected revenue from all Spanish colonies from the 16<sup>th</sup> to 18<sup>th</sup> century, stated: “Vamos a copiar! Vamos a copiar lo que está en la pizarra y pasamos a las lecturas de la página 27” [Let’s copy! Let’s copy what is on the board, and then we move onto reading the book on page 27]. These examples show how delivered the social studies class. Teachers navigated back and forth between these strategies to strengthen their lessons. Teachers’ voices on PRNI intertwined with curricular content in the social studies class.



*Lecturing and dictation.* Teachers preferred to lecture. The hours recorded demonstrate teachers' preference for lecturing, as they repeated what they wanted students to learn. For example, during a typical class day, Mr. Almeida asked students to open their textbooks, read some passages, and further explain the reading. Students had few opportunities to ask questions; they passively listened to the teacher and took notes in their notebooks. Class discussions were teacher-centered, as the teacher read the textbook along with the students.

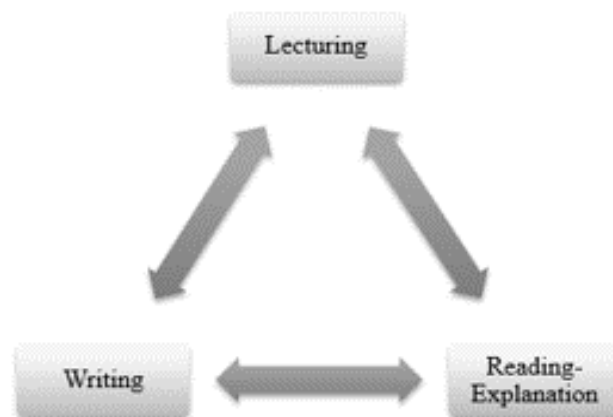


Figure 9. Teacher participant multidirectional cycle of instructional strategies preference.

The following example shows how teachers dictated class. Transcripts show that during class, students had little opportunity to ask questions. When they had the opportunity, students asked short questions. Teachers rapidly diverted questions back to their lecture in an effort to follow their lesson plan. The following is an excerpt (see translation on Appendix O) from Mr. Ramírez's class, teaching about Lola Rodríguez de Tió, a famous Puerto Rican poet who wrote Puerto Rico's revolutionary version of the national anthem, *La Borinqueña*:

Señor Ramírez: fue sacada del país por sus ideales. Tú sabes que usted se sienta bien patriótica, que usted quiera a su patria libre y a usted la saquen del país porque usted es un atentado para la nación. Un ejemplo, para aquel tiempo era española y miren, no simplemente española, esto nuevo se vive con las carpetas, con la nación norteamericana. Dos sucesos bien parecidos, escuche para que se eduque, dos sucesos bien parecidos lo vivimos con los españoles con el Grito de Lares donde se destierra a todas aquellas personas que aman a Puerto Rico porque defienden su libertad son desterrados y alejados de la isla. Es como si yo le dijera a, ahora mismo recoge tus cosas, te tienes que ir porque si no te van a meter presa de por vida por lo que tú piensas. Tú piensas que quieres ver a Puerto Rico libre, no asociado con los Estados Unidos y eso es atentar contra la asociación de Puerto Rico y Estados Unidos y te mandan a vivir afuera, mira, hello, te mandan a vivir afuera, tienes que dejar a tu familia, a tu mamá, a tu papá, etc., y desde afuera donde de donde te enviaron tú vas a seguir luchando por tus ideales y vas a seguir luchando y esto fue la experiencia que vivieron estas personas. No simplemente ella, un sinnúmero de líderes y esto también se va a dar con la nación norteamericana. La nación norteamericana perseguía a todos aquellos que atentaban contra la asociación norteamericana que eran los independentistas e hicieron una carpeta para luego más tarde ustedes estudiaron lo que fueron las carpetas. La carpeta era donde te ponían está en el baño ahora bañándose salió para una reunión con fulano de tal y fulano de tal, está haciendo esto... Todo eso era como tu vida en un diario donde alguien te estaba investigando que tú hacías y qué dejabas de hacer.

The previous passage illustrates how teachers and students interact in class. While studying Manuel Alonzo's poem, *El Puertorriqueño* [The Puerto Rican], the teacher discusses Puerto Rican physical traits and elaborates on the Puerto Rican character. The teacher focuses on the exile of Lola Rodríguez de Tió, a nineteenth-century Puerto Rican poet, whose poems supported the Puerto Rican revolutionary movement and later, inspired the adoption of *La Borinqueña*, Puerto Rico's National Anthem. In this passage, the teacher's voice becomes intertwined with curricular content.

Specific passages from this excerpt reveal what discourse analysis theorist, James Paul Gee (2008) describes as ideology. Gee indicates that ordinary people possess tacit theories, or particular ideologies, specifically bound to context: "I will say that people

hold theories about all sorts of things, because in many cases . . . people's beliefs (and even prejudices) hang together and cohere in ways that are certainly like theories" (p. 7).

What ideology or theory is Mr. Ramírez promoting on this passage? While discussing one of the major figures of the nineteenth-century Puerto Rican independence movement, Mr. Ramirez used language that referred to bravery and patriotism. Although one can argue that the passage could be taken out of context, it appears to me that his word choices carry an ideology that favors independence. Mr. Ramirez used words and phrases such as *ardiente luchadora* [avid fighter], *luchar* [to fight], *ideales* [ideals], *patriótica* [patriotic], *libertad* [freedom], and *las carpetas* [files] to describe how Rodríguez de Tío experienced exile due to his political views.<sup>20</sup> While I do not oppose promoting independence in Puerto Rican schools, none of the teachers mentioned statehood, nor described any pro-statehood leader in their classes. Teachers' voices need to be balanced and include the variety of political discourse of the island.

*Reading-Explanation.* Teachers taught unit 3 of the textbook, *La conquista y colonización de Puerto Rico* [Conquest and colonization of Puerto Rico]. Reading the textbook was one the major instructional components of the social studies class. Teachers relied on the textbook as the main source of information in the classroom, as well as for practice and worksheets. For example, Mr. Ortega constantly read the book with his students. He would ask a student to read a portion of the book and further elaborate on the passage just read. In ten out of twelve observations, Mr. Ortega asked students to

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<sup>20</sup> *Las carpetas* are the files of pro-independence leaders that the government of the United State created to harass and criminalize the Puerto Rican independence movement. Many pro-independence figures such as Pedro Albizu Campos and Juan Mari Bras were profiled through *las carpetas*.

write down a passage from the textbook in their notebooks for future reference: “Copie eso, que eso es importante” or “Vamos a copiarlo que eso viene en el examen”. [Go ahead and copy that, which is important] or [Let's copy that because you will be tested on that]. The Socratic Method helped keep students engaged with prompts and questions. Mr. Almeida engaged students with questions over the readings. The Socratic Method has been proven to develop critical thinking skills (Paul & Elder, 2007), but must be supported with other strategies and activities to achieve maximum potential in the use of these skills (Paul & Elder, 2007). Because they lacked technology in the classroom, I perceived that teachers did not have sufficient resources to provide content-rich lessons. My observations reflect (a) students' complaints about the old-fashioned social studies class and (b) teachers' complaints about science and math receiving more resources.



*Figure 10.* Descubrimiento de Puerto Rico [The Discovery of Puerto Rico]. A picture from the social studies textbook depicting the arrival of the Spanish conquistadors to the shores of Borikén. Retrieved from <https://goo.gl/83E8qt>

*Writing.* Teachers used the textbook as their main didactical resource. Teachers often asked students read the textbook and then engaged students with question prompts

and discussion. At the end of class, students answered end-of-the chapter questions and wrote in their notebooks. Summarizing book pages, and copying information from the classroom board emerged as common instructional activities in the classroom.

Student complained about the overuse of the notebook during class. Teachers used this strategy to keep students occupied. For example, Mrs. Ortega indicated that “cuando yo necesito que sepan algo, lo escribo en la pizarra” [when I need for them to learn something, I write it on the board]. Mr. Ortega, on the other hand, suggested that writing on the classroom board keeps the students busy: “A veces hay que mantenerlos ocupados. Por ejemplo, yo les lleno la pizarra cuando tienen repaso del examen para que no se cuelguen” [Sometimes you have to keep them busy. For example, I fill the board with information when they have an upcoming test so that they do not fail]. These comments, although well intended, provoked dissatisfaction among students. As a student mentioned earlier, the social studies class is all about reading and writing. Teachers acknowledged that reading and writing as stand-alone instructional strategies are not necessarily best teacher practices for learning. Nonetheless, teachers argued that students exhibited low academic performance. Therefore, teachers felt forced to use instructional strategies limited to basic activities, such as copying from the board.

### **Conclusion**

A significant disconnect exists between what teachers described as their own educational philosophy and their actual pedagogical practices. Furthermore, and perhaps more relevant to this study, teachers were reluctant to use representations of non-traditional models of PRNI in their classroom. Teachers often suggested a pro-independence model of PRNI that dismisses U.S. citizenship and the pro-statehood

movement. The use of specific examples or commentary during the social studies class further illustrates how teachers taught students a particular discourse of PRNI.

The 7<sup>th</sup> grade social studies curriculum guide in Puerto Rico represents a fixed set of educational principles encircling a complex group of historical events, ideologies, and debates. This curriculum questions and, at the same time, provides answers that address Puerto Rican identity struggles: What does it mean to be Puerto Rican? At the 7<sup>th</sup> grade level, teachers adapt this debate for students, whose developmental stage includes identity formation. The audio recordings of the classes in session allowed me to carefully examine how teachers taught students about Puerto Rican-ness. The transcription and analysis of audio recordings of classes in session unveil a discourse that appropriates and attributes certain characteristics to the Puerto Rican ethos, and more specifically, to a national character. “The social studies class is all about that which is ours,” Mr. Almeida said, “a class of Puerto Rican identity.” This statement, recorded in a focus group interview with teachers, resonates with several aspects of the 7<sup>th</sup> grade social studies curriculum.

However, and more importantly, this study shows that that students’ rely on additional resources outside of the social studies class to craft their own national identity. This dynamic recreates Barrett’s (2007) assertion that adolescents negotiate a meaning-making process that, indeed, takes place in formal school settings, but also elsewhere. *Figure 7* showed how PRNI rests at the core of an unidirectional instructional dynamic in which students sit and take notes on what teachers believe to be important. Students either accept or reject what is being taught and develop their own conclusions based on their own convictions and experiences.

In terms of pedagogy, students stressed how dissatisfied they were when teachers relied on lecturing and dictation as the preferred methods of instruction. The 7<sup>th</sup> graders indicated that they found these common, but overused, instructional strategies boring. Furthermore, these methods turned out to be counterproductive in the development of a strong national sentiment. They recreated teacher-centered strategies that failed to engage students in the process of learning about PRNI. As millennials would argue, there is no app for national identity.

In a recent publication of the National Council for the Social Studies, Grant (2013) describes why students dislike social studies class. This has been a subject of interest for this organization for decades. Grant suggested that students lack enthusiasm for the social studies class because of poor instructional experiences. Grant argues that teachers should develop content-rich instructional experiences that transcend the year-long textbook coverage. Similarly, throughout the observations of classes in session, I employed Freire's (2000) idea of banking education that compares the act of educating children with depositing money into an account. This notion suggests that students are passive recipients of curricular content and diminishes students' own critical thinking skills. Furthermore, Bereiter and Scardamalia (2005), while referring to factual knowledge, discouraged educators from filling students' minds as if filling kitchen cabinets with groceries. I identified specific pedagogical strategies that teachers heavily employed and students easily recognized. Unfortunately, these pedagogical strategies do not foster an understanding of PRNI as a malleable construct. In fact, students complained about teachers' choices for instructional strategies.

## CHAPTER FIVE

### SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

“Don’t let schooling interfere with your education.”

-Mark Twain

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In Chapter 1, I described my own journey to answer the question: what does it mean to be Puerto Rican? I discussed how becoming a social studies teacher and graduate student in the U.S. transformed my views about PRNI. I also described how I came to challenge prescriptive notions about PRNI by examining different views on identity. For example, I discussed how being a statehood supporter does not mean opposition to being Puerto Rican. I also elaborated on how living on the mainland shaped my notions of Puerto Rican identity through exposure to different nationalities, languages, and cultures. Being exposed to other ways of being allowed my identity to flourish.

In Chapter 2, the literature selected for review suggested that the Puerto Rican *ethos* experienced several transformations across time and space; a recognizable Puerto Rican identity emerged during the 19<sup>th</sup> century. The literature demonstrated that Puerto Rican identity was not static, but instead malleable, transforming and redefining itself continuously. This particular view of identity challenges notions of singularity, which implies that PRNI means something different to everyone.

Chapter 3 described how I investigated the way teachers taught PRNI in the 7<sup>th</sup> grade and the methods employed to address the research questions. I became concerned



with:

- What themes of Puerto Rican national identity emerge in social studies classes in PR?
- How do social studies teachers in the 7th grade deliver concepts related to PRNI?
- How important is national identity for 7th grade social studies students in Puerto Rico?
- How do 7th grade students identify themselves in terms of national identity in PR

To analyze questions of national identity, I selected a mixed method approach. A concurrent embedded strategy served as an adequate model for the research. Researchers often use this model when the dominant method of data collection is qualitative in nature and a portion of quantifiable data is also analyzed. Thus, data was collected through (a) the audio recording of classes, (b) focus group interviews with 7<sup>th</sup> grade students and teachers, and (c) the administration of a survey. I discussed data collection methods and their results in Chapters 4 and 5.

### **Identity Models**

Two competing identity models exist between what social studies teachers teach in their classes and what students conceive of as being Puerto Rican. On the one hand, teachers try to promote a certain identity model. Teachers promoted customs and traditions, patriotic themes, and romanticized ways of being, enacted through folklore and essentialist elements such as language, place of birth, and geography. On the other hand, students understood PRNI at levels that transcended language, place of birth, and folklore. Students made specific references to their immediate everyday lives, family, heritage, and national pride. More importantly, while discussing PRNI, students made few references to their social studies class as their source of information about national

identity. Teachers' notion of la puertorriqueñidad differs from that of the students in the following ways:

1. Teachers taught about "that which is ours," which implies teachers' ownership of PRNI in the classroom. Teachers used their classes to promote a national identity that served as a badge of pride unique to the Puerto Rican character. In the classroom, however, students found folklore and tradition fascinating, but paid more attention to occasions and circumstances that awaken pride in being Puerto Rican in everyday life (e.g. the Olympics, sports tournaments, talking to grandparents, when talking to a tourist, when visiting another country, and seeing their neighbors leave the country).
2. Teachers believed their social studies classes to be classes on Puerto Rican identity. They expected students to learn what it means to be Puerto Rican. However, although 7<sup>th</sup> grade students possess a strong sense of identification with PRNI, they have difficulties verbalizing and articulating what national identity is and what it means to be Puerto Rican based on what they learn in the social studies class. The evidence presented in this study suggests that students learn about Puerto Rican-ness, not so much in the classroom, but from their families, and more specifically, from their grandparents.
3. Teacher participants sympathized with independence for Puerto Rico, asserting that political sovereignty would reaffirm cultural nationalism. However, several students expressed an affinity for a closer relationship with the U.S., because relatives and friends have relocated to the mainland due to socioeconomic reasons.
4. Teachers affirmed that the units covered throughout the school year (geography of the island, the indigenous Taíno Indians, Columbus and the discovery, and the

- subsequent events of slavery, and the conquest of the Antilles by the Spanish conquistadors) provide students with a sense of what it means to be Puerto Rican. However, students expressed more interest in more contemporary developments in Puerto Rican history, as they feel closer and more familiar with historical events that sound similar to their daily experiences.
5. Teachers employed particular pedagogical strategies in their classes. Teacher participants relied on lecturing, passive work, writing, reading, and answering questions to teach their classes. However, students complained that they found the social studies class boring, especially due to the lack of technological devices that might enhance the delivery of the class.
  6. The classes observed and the curricular content covered in these classes made little reference to national identity as an always-in-motion construct.

The previous findings recreate recent intellectual debates between an essentialist and dynamic view of PRNI. In the essentialist view, PRNI is subject to question. The dynamic view of national identity, on the other hand, finds its foundation in how identity is rendered by our cultural practices today. Students, consciously or unconsciously, produced ideas about national identity in their everyday life, whereas teachers believed the textbook dictated what it means to be Puerto Rican.

### **Status of the School System in Puerto Rico and Its Impact on Identity**

In December 2013, the Program for International Student Assessment (PISA), which administers an international exams in reading, mathematics, and science literacy around the world, released its report on its assessment of 1,668 Puerto Rican students from fifty six public and private schools. The results showed Puerto Rican students

performing poorly in all subjects (Kelly et al., 2013). According to the report, students ranked 58 out of 65, with a score of 379 out of 669 in math, barely above Peru, Qatar, Indonesia, and Colombia. In science, Puerto Rican students obtained a score of 401 out of 708, and ranked 55 out of 65. Finally, in reading, Puerto Rico's students only outperformed Jordania, Malaysia, Argentina, and Peru with a score of 404 out of 698 and ranked 53 out of 65.

These scores exposed a tremendous crisis: Puerto Rican students exhibit low academic achievement. What does this say about the education system in Puerto Rico and national identity? In a 2014 public hearing related to a years-long class lawsuit filed against Puerto Rico's Department of Education for failing to provide special education services to a group of students, Puerto Rican Federal Justice, José A. Fusté, stated: "no es un secreto" the judge said, "que la calidad de la educación es deficiente, incompleta, vergonzosa, negligente, lamentable, no honorable" [it is not a secret, the quality of education is deficient, incomplete, shameful, negligent, unfortunately and dishonorable] (Vergonzosa la calidad de educación en las escuelas públicas, 2014, para. 1). Why is the system failing?

My research uncovered a cycle of instruction that students resented. Students avidly complained about how teachers delivered the social studies class and the instructional strategies they employed. Reading the book, note taking, and lecturing decreased students' interest in the social studies class. The lack of technology in the classroom also contributed to students' dissatisfaction. If students are not engaged in the delivery of social studies classes through lessons centered on students' interest, the social studies class will have little impact on their understandings of PRNI.

Teachers' voices intertwined with curricular content. In their classes, teachers often linked PRNI to supporting independence. Teachers delivered classes that made little reference to national identity as an always-in-motion construct that may include lessons around statehood and American citizenship. Rather than promoting political ideology in the classroom, teachers should acknowledge students' unique biographies and how everyday life impacts the development of national identity. The recognition of student biographies promotes the development of critical thinking skills, as the construction of knowledge is unique to each individual. Using students' prior knowledge and personal experience as a starting point for developing lessons on PRNI fosters a better understanding of PRNI. The relationship between developing critical thinking skills and the understanding of PRNI needs to be further investigated.

### **Puerto Rican schools uninhabited and the redefinition of PRNI**

In recent years, Puerto Rican migration to the mainland has gained attention among scholars and the general media: *¡La isla se está vaciando!* [The island is getting empty]. This massive and alarming migration suggests new reflection on what it means to be Puerto Rican. With families abandoning the island at an alarming rate, school enrollment has significantly decreased among elementary and secondary age students. Puerto Rico currently has 40% fewer students than in 2000. According to Puerto Rico's Education Council (Calderón, 2013), student enrollment has continued to decrease dramatically. Between 2002 and 2012 school enrollment in Puerto Rico decreased from 591,868 to 452,740 students, which is a reduction of approximately 149,000 students in ten years, or 74,000 in five years (Estampida de estudiantes, 2012).

Government officials have developed a plan to cut the number of schools and

teachers on the island. As of 2016, Puerto Rico's Department of Education planned to close nearly 600 of the 1,460 schools on the island due to low enrollment and budget cuts. These numbers suggest that adolescents are learning to be Puerto Rican outside the island, in places such as Central Florida, Texas, and New York. Despite the unhealthy financial situation of the island, the crisis calls for a reconfiguration of the cultural and political identity of the island, especially as the Puerto Rican diaspora continues to grow on the mainland.

In their interviews, teachers privilege a discourse of a singular Puerto Rican identity. The theoretical framework informing this study assumes that multiple Puerto Rican identities exist within groups of people, inside and outside the island. Moreover, Puerto Ricans themselves have multiple and sometimes competing or contradictory identities. Social studies teachers who claim that Puerto Ricans have only one identity available fail to adopt a liberatory education stance (Freire, 1970; McLaren, 1995; Slater, Fain, & Rossatto, 2002). Such liberatory education should act upon and be inclusive of the diversity of models of Puerto Rican identity and its pluralistic assumption. No one can claim a unique and exclusive way of enacting Puerto Rican identity (Pabón, 1995). As Galeano (2005) stated: "La identidad no es una pieza de museo, quietecita en una vitrina, sino la siempre asombrosa síntesis de las contradicciones nuestras de cada día" (p. 111), which means [identity is not a motionless piece on its own stand at a museum, but the always impressive synthesis of our very own daily contradictions].

## **Conclusions**

Eliza Colón (1989) asserted that educators, consciously or unconsciously, perpetuated the colonial mindset, which in turn, slows advancement towards

decolonization. I believe that such colonial mindset should be replaced with the valorization of multiple voices of the Puerto Rican genre, coexisting in a multidimensional spectrum that includes the discourse of statehood. As Freire (2000) implied, through our interactions with reality, people develop ideas, concepts, and institutions. Through the praxis of such developments, men become historical entities created simultaneously with history. In other words, students in schools are both becoming historical entities and creating history through their experiences in the social studies class. The privileging of political ideologies in schools implies a skewed historical praxis that students either accept, contest, or reject. To promote a classroom atmosphere that fosters the study of PRNI from a critical standpoint, social studies teachers need to adopt student-centered strategies.

### **Recommendations for Social Studies Educators**

I currently serve as a Dual Language teacher in a school district in the state of Illinois. For the past few years, I have collaborated with the district to design a Spanish Language Arts (ALE)-Social Studies instructional block for 7<sup>th</sup> grade dual-language students.<sup>21</sup> I find this professional experience important because language use defines cultural and ethnic identity. While teaching this curriculum guide, I witnessed how my students struggle with complex constructs, such as language use, Latino heritage, and national identity.

As a member of the curriculum committee, I advocated for a curriculum that emphasized cultural diversity. The curriculum committee adopted differentiated

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<sup>21</sup> Several educational organizations, including the Center for Applied Linguistics and Dual Language Education of New Mexico, have praised and acknowledge the value of this curriculum guide (Walero, 2016).

instruction as one of its guiding principles as described in a paper presented at the International Congress for School Effectiveness and Improvement in 2011 (Stavroula, Kyriakides, & Koutselini, 2011). In this paper, the authors stated: “In a constructivist learning process where differentiation is applied, a child-centered teaching approach sees every student as a unique ‘*biography*’ [emphasis added] and not as a copy of the same picture” (p. 4). The term biography, as used in the context of differentiated instruction, implies that each student has a unique set of characteristics directly associated with identity. As I transfer my current professional experience onto this research study, discovering students’ unique set of personal and cultural traits is as important as delivering the content of any given curriculum guide. For that reason, 7<sup>th</sup> grade social studies students in Puerto Rico will benefit from teachers’ commitment to:

[The] construction of knowledge as a unique personal learning process, where each person understands and gains meaning of new knowledge based upon their prior knowledge and their personal beliefs and needs. (School District U-46 English Language Learner Office, 2017).

Social studies teachers in Puerto Rico may enhance their lesson plans and curricular content by pre-assessing student’s beliefs about PRNI. The value of this step prior to the start of the school year will provide teachers with meaningful data to assist them with designing useful lessons, unique to their students. Puerto Rico’s Department of Education should support teachers with the design of such pre-assessment.

I also recommend including social studies teachers’ voices into the school and district-wide decision-making process. In this study, teachers revealed their level of dissatisfaction over how Puerto Rico’s Department of Education favors STEM classes



over the social studies curriculum across all grade levels. However, acknowledging teachers' voices and perspectives ensures the development of a content-rich curriculum and promotes a high standard of academic rigor. Educators should participate in an extensive scrutiny of the resources employed in the 7<sup>th</sup> grade social studies classroom. This process would involve reading the social studies material, inspecting the appropriateness of resources' language, content, and graphics, and recommending its adoption for specific units within the curriculum guide. Furthermore, Puerto Rico's Department of Education should sponsor small intellectual gatherings to discuss the educational value of resources that promote identity as a crucial component of what teachers called *una clase de puertorriqueñidad* [a class on Puerto Rican identity]. Teachers need to be involved in the process of selecting educational materials, resources for the social studies class, and validate the resources with students' views on PRNI. Precisely, how to incorporate students' understanding of PRNI into the social studies classes is an area that calls for further research.

### **Recommendations for Further Study**

This study revealed that teachers' views about PRNI contrast with that of their students. Students do not come to the social studies class as empty containers; they already have a sense of national identity and belonging to Puerto Rican culture. However, teachers aim to identify such traits to nurture an understanding of identity that transcends standard social studies themes (the flag, traditions, and the national anthem). Thus, it is important to further investigate how teachers can support identity development in their classrooms and school districts. Also, it is imperative to continue researching how our personal lenses, as well as our political and cultural ideologies, help or hinder this work

as the island continues to experience migration and economic depression.

What students bring to the classroom (socioeconomic status, religion, academic background, political views, and systems of beliefs), needs to be better understood to further decipher how and why national identity becomes important. This study revealed how important PRNI is for Puerto Rican students; however, further research is needed to quantify the extent to which individual variables impact how important PRNI is to students. How does being pro-statehood or pro-independence shape students' views on Puerto Rican-ness? Is it socio-economic status that defines national identity? In a country where Catholicism is ingrained into the fabric of national identity, how does religion shape national identity? Furthermore, how do literacy and bilingualism influence the development of national identity? Addressing these questions will unveil notions about PRNI in specific contexts. Furthermore, continuing research in Puerto Rican schools through a longitudinal study will provide the appropriate setting to track how notions of identity change through time and how social forces impact such notions.

### **Final Remarks about Puerto Rican Education and Identity**

In March of 2012, the 20<sup>th</sup> Annual International Democratic Education Conference (IDEC) was held in Caguas, Puerto Rico, my hometown. During the conference, educators from all over the world met with their local counterparts to present their views and contribute to the global development of democracy within educational systems. As an observer, I was privileged to listen to dozens of presenters whose ideas about how we educate future generations aim to transform education as we know it.

The themes of the conference highlighted how the lack of democratic principles in curricula around the globe combined with community disempowerment undermines the

foundation of entire societies. Puerto Rico urgently needs to re-examine how Puerto Rican children are being educated, particularly, how instruction is delivered, and how educators imprint character into Puerto Rican students. As the landscape of the education system in Puerto Rico continues to change demographically and in terms of achievement outcomes, innovative strategies and policies need to be adopted to create a responsive, updated system that integrates community-based organizations to revitalize schools. The democratization of Puerto Rican schools, which implies the accountability of multiple voices within the system, needs to be based on innovative and democratic processes in which different voices are heard. In the classroom, however, the democratization of schools not only implies that teachers must consider new ways of educating children, but also the need to integrate newer findings and fresher views related to their curriculum. Teachers will become obsolete if their methods of teaching are obsolete. Democratization also requires two additional elements: 1) cultural exchanges and 2) social justice. Discussions about educational reform might be sterile if innovation, cultural exchanges, and social justice do not become the pillars of a Puerto Rican educational reform.

Former Secretary of Education in Puerto Rico, Dr. Rafael Aragunde, was a keynote speaker for IDEC 2012 and his ideas about Puerto Rico's education system resonate with how we teach students about Puerto Rican national identity. Aragunde suggested that for an educational reform to take place, Puerto Rican educators must:

- Identify the distinction between education and “la escolaridad,”; the latter refers to reducing education to schooling, and therefore, the responsibility to educate individuals has been “scholarized” or discharged only on schools,
- Recognize an evident and increasing cultural pluralism in Puerto Rican schools,

which is more obvious when socioeconomic status is considered,

- Meet the challenges of social inequities in Puerto Rico, which have increased dramatically in the last three decades.

According to Aragunde, “the school is responsible for everything,” from babysitting to teaching values. Parents, communities, and even state officials, all look to the school as the entity responsible for producing good and responsible citizens. However, Aragunde’s argues that the democratization of Puerto Rican schools requires commitment from community organizations, state agencies, and, most importantly, the voices of those doing the “fieldwork,” meaning parents, teachers, and students. These sectors mustreclaim their space and create a democratic vision for Puerto Rico’s future.

I believe that school reform needs to emanate from within local communities, though educators may provide advice on the pedagogical aspect of switching from a “scholarized” model to one of community empowerment. The circles where academics and intellectuals discuss education reform need to be brought into the communities, outside the buildings of a university campus. Educators at all levels need to embrace the project of developing a democratic education system.

Throughout the conference, many educators, including international visitors suggested dismantling Puerto Rico’s Department of Education. This proposition represents an innovative step towards a more democratic educational system. In the classroom, this proposition translates into a more dynamic way of looking at education. “We can no longer conform ourselves,” Aragunde said, “with a textbook, a notebook, a blackboard, and chalk”. Innovation and the re-invention of curriculum delivery are necessary for the democratization of Puerto Rican schools. Flexibility and openness to

adopting new paradigms will result in better student outcomes. In this study, students spoke to educators, expressing dissatisfaction for educational strategies that rely on the textbook, the notebook, and the board. The Department of Education needs to be held accountable for providing teachers with adequate resources to make the education process a meaningful one. At the same time, teachers need to be open to identifying ways to improve the delivery of social studies classes.

Educators can no longer ignore cultural pluralism, the kind that acknowledges the existence of multiple discourses of national identity and the variables that shape such constructs. This study demonstrates that the push for a particular way of being Puerto Rican is nothing but an unintended effort to perpetuate the lack of democracy typical of colonial mindsets. However, this time, the recipients of such discourse, the students, had the chance to talk to me about their views on Puerto Rican identity.

### **Final Remarks about PRNI**

Puerto Rico is in crisis. As of February of 2017, the island has accumulated a multi-billion dollar debt (72 billion dollars), considered by well-respected economists as unpayable, due to the lack of revenue and a self-inflicted recession caused by borrowing money without a repayment source. The island's current political status, the so-called commonwealth, restricts economic development as it no longer benefits from the tax credits that the island enjoyed after the enactment of the commonwealth through the late 1990s. Currently, the island is subject to the authority of an Oversight Board. Created by the authority of Congress, the board oversees Puerto Rico's budget and allocation of resources, reenacting and reassuring Congress's plenary powers over the island as a territorial possession of the United States.

Even more alarming, population decline threatens Puerto Rico's future and possible rehabilitation. According to a Pew Research Center analysis of Census Bureau data, "Puerto Rico's population began declining in 2006 and has continued every year through 2013, while the population of Puerto Ricans on the U.S. mainland has grown" (Paragraph 2). More recently, a 2017 report on Puerto Rico's population found that close to 174,000 Puerto Ricans left the island between 2014 and 2015. Approximately 1,800 to 4,500 of these people were teachers (Velázquez-Estrada, 2017). Sadly, I am one of those teachers that left the island in search of better opportunities.

Approximately 42% of Puerto Rican immigrants have left the island due to job-related reasons. I left the island and became part of the Puerto Rican diaspora, seeking new career opportunities and a superior quality of life. When I made my decision to emigrate in 2014, I understood that the mainland could provide me new job opportunities, allow me to raise a family under better financial circumstances, and place me closer to the so-called American dream. However, my experience and that of many Puerto Rican families shows that the American dream is now a Puerto Rican one. Puerto Rico has been subject to colonial subjugation since its discovery in 1493, once under Spain and now under the United States. Puerto Ricans need to embrace the dream of freedom and fight for it. I am willing to submit the case for Puerto Rico's statehood, embracing my responsibilities as a U.S. citizen and challenging the inequalities the Territorial Clause of the U.S. Constitution allude to the Puerto Rican archipelago. Countless pro-independence Puerto Ricans theorize that embracing statehood diminishes being Puerto Rican and that statehood threatens Puerto Rico's culture. I disagree. I distinguish between cultural and political identity. Becoming a state of the union is consistent with being Puerto Rican. I

did not stop being Puerto Rican the moment I migrated to the mainland. On the contrary, I have embraced my identity and have valued my heritage even after I was exposed to different cultures.

Finally, it is time for the liberation of the oldest colony in the world and for unity of purpose in solving Puerto Rico's colonial trajectory. The 7<sup>th</sup> grade social studies class plays a pivotal role in developing critical thinkers and teaching students about the injustices of colonialism. Our current relationship with the United States diminishes our dignity as a nation, and given the present crisis on the island, Puerto Ricans may face a humanitarian crisis within the next few years. Solving the fiscal crisis and the status question becomes a social justice issue that originated from the colonial condition. Thus, justice needs to be brought to the American citizens living in Puerto Rico. No American citizen should be treated as a second class citizen. Puerto Rico's crisis is an equal rights problem.

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APPENDIX A: INVITATION TO PARTICIPATE IN RESEARCH STUDY



**Division of Teaching and Learning**

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314-258-1169  
E-mail: [jddiaz@umsl.edu](mailto:jddiaz@umsl.edu)

10 de enero de 2012.

Estimado estudiante:

Mi nombre es Jesús Daniel Díaz Peña, estudiante doctoral de la University of Missouri-St. Louis en el Programa Graduado en Educación. Como requisito para obtener el grado de doctor en educación, es necesario llevar a cabo una investigación. La investigación que he diseñado tiene como propósito conocer lo que se enseña sobre la identidad nacional puertorriqueña en la clase de estudios sociales.

Me gustaría que participara de este estudio, ya que se encuentra tomando el curso de estudios sociales del 7mo grado. Su participación en el estudio consiste en completar una encuesta en varios momentos del semestre. También es posible que sea seleccionado para participar de entrevistas grupales. Por último, como investigador estaré observando la clase de estudios sociales en la que usted participa.

Los datos que se obtengan a través de la encuesta y las entrevistas serán anónimos y confidenciales. Su participación es voluntaria y puedes negarte a participar en cualquier momento durante el proceso del estudio.

Si decide participar de este estudio, debes contar con la autorización de tus padres o encargados. Tanto usted como su padre o encargado, deberán firmar unas hojas de Consentimiento Informado que acompañan esta carta. Si tienen alguna duda sobre su participación, pueden comunicarse conmigo 314-258-1169 o al email [jddiaz@umsl.edu](mailto:jddiaz@umsl.edu). Los resultados de este estudio estarán disponibles para su revisión en la Sala de Educación de la Barnes Noble Library de la University of Missouri-St Louis y en la Biblioteca del Departamento de Educación.

Gracias por su colaboración.

Jesús D. Díaz Peña, EdD Candidato  
University of Missouri, St. Louis  
College of Education

APPENDIX B: GENERAL CONSENT FORM



**Division of Teaching and Learning**

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**Informed Consent for Participation in Research Activities**

*The importance of national identity in social studies classes in Puerto Rico: "Lo nacional" in the classroom.*

Participant \_\_\_\_\_ HSC Approval Number \_\_\_\_\_ 307073-2 \_\_\_\_\_

Principal Investigator (PI)  Jesús D. Díaz Peña  PI's Phone Number  314-258-1169

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1. You are invited to participate in a research study conducted by Jesús D. Díaz Peña, under the supervision of Dr. Jacquelyn Lewis-Harris. The purpose of this research is to know more about the curricular content of social studies classes in Puerto Rico, more specifically the content related to Puerto Rican national identity.

2. a) Your participation will involve:

➤ Focus groups:

You will be invited to participate in group interviews with several of your colleagues. Three separate one hour interviews will be conducted throughout the semester. During the interviews, we will talk about the experience of teaching social studies classes and about the concept of national identity in the classroom. As part of the research process, I will audio record the interviews.

Approximately 14 teachers may be involved in this research. The participants involved in this study come from your school and from an additional research site from the Education Region.

➤ Observations:

Four teachers will be invited to participate in the observation part of the study. I will be observing, taking notes and audio recording your social studies class. Observations will be conducted on several occasions throughout the semester (March, 2012 through March, 2013). It is also possible that you will be asked to facilitate the collection of documents and artifacts such as lesson plans and instructional materials related to the social studies class.

b) The amount of time involved in your participation will be:

➤ Focus group:

Your participation in a focus group will require a time commitment of no more than three

separate one hour sessions throughout the semester. The interviews will consist of a set of questions regarding the social studies class and Puerto Rican national identity. The interview will be conducted at a convenient time outside school time.

➤ Observations:

In coordination with teachers, I will select one convenient class period to conduct the observations. Observations will be conducted biweekly during the entire length of the social studies class being observed. Observations will be conducted without disrupting the natural course of the instructional period and/or activities related to the social studies class. No more than 10 class periods will be observed.

3. There are no anticipated risks associated with this research. There is also no cost involved with your participation in the study.
4. There are no direct benefits for you participating in this study. However, your participation may contribute to the development of content-rich curriculum guides and lessons for the social studies class and may help society to obtain a better comprehension of the importance of Puerto Rican national identity.
5. Your participation is voluntary and you may choose not to participate in this research study or to withdraw your consent at any time. You may choose not to answer any questions that you do not want to answer. You will NOT be penalized in any way should you choose not to participate or to withdraw. The principal investigator, Jesús D. Díaz Peña, will be responsible for maintaining the confidentiality of your data. In addition, all data will be stored on a password-protected computer and/or in a locked office. The materials will be kept safe for a period of 3 years and then destroyed.
6. By agreeing to participate, you understand and agree that your data may be shared with other researchers and educators in the form of presentations and/or publications. In all cases, your identity will not be revealed. In rare instances, a researcher's study must undergo an audit or program evaluation by an oversight agency (such as the Office for Human Research Protection). That agency is required to keep your identity confidential.
7. If you have any questions or concerns regarding this study, or if any problems arise, you may contact the Investigator, Jesús Daniel Díaz Peña at 314-258-1169, or by email [jddiaz@umsl.edu](mailto:jddiaz@umsl.edu) or the faculty advisor, Dr. Jacquelyn Lewis-Harris at 314-516-6023. You may also ask questions or state concerns regarding your rights as a research participant to the Office of Research Administration, at 516-5897.

**I have read this consent form and have been given the opportunity to ask questions. I will also be given a copy of this consent form for my records. I consent to my participation in the research described above.**

---

Participant's Signature  
Date

---

Participant's Printed Name

---

Signature of Investigator or Designee  
Date

---

Investigator/Designee Printed Name

Thank you very much for your time. Please, if you have any questions do not hesitate to contact me at 314-258-1169.

APPENDIX C: PARENTAL PERMISSION FORM-OBSERVATIONS AND SURVEY



**Division of Teaching and Learning**

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**Informed Consent for Child Participation in Research Activities**

The importance of national identity in social studies classes in Puerto Rico: "Lo nacional" in the classroom.

Participant \_\_\_\_\_ HSC Approval Number \_\_\_\_\_ 307073-2 \_\_\_\_\_

Principal Investigator \_\_Jesús D. Díaz Peña\_\_ PI's Phone Number \_\_\_\_\_ 314-258-1169 \_\_\_\_\_

---

1. Your child is invited to participate in a research study conducted by Jesús D. Díaz Peña, under the supervision of Dr. Jacquelyn Lewis-Harris. The purpose of this research is to know more about what is taught in the social studies classes in Puerto Rico, more specifically the content related to Puerto Rican national identity.

2. a) Your child's participation will involve:

➤ Observations:

I will observe your child's social studies class. I will be observing, taking notes and audio recording the social studies class. Observations will be conducted on several occasions between March, 2012 and March, 2013. It is also possible that I will collect documents and artifacts such as school assignments and exams, notebooks and other instructional materials related to the social studies class. No more than 10 class periods will be observed.

➤ Survey:

Your child will be invited to respond to a short survey on Puerto Rican national identity. The survey will determine how important Puerto Rican national identity is for your child. The survey will be administered three times throughout the semester during the social studies class period and shall not take more than five minutes of your child's time.

Approximately 360 students and 14 teachers may be involved in this study. Student and teacher participants will be recruited from two schools within the Education Region.

b) The amount of time involved in your child's participation will be no more than fifteen minutes.



3. There are no anticipated risks to your child associated with this research.
4. There are no direct benefits for your child's participation in this study. However, your child's participation will contribute the development of content-rich curriculum guides and lessons for the social studies class and may help society to obtain a better comprehension of the importance of Puerto Rican national identity.
5. Your child's participation is voluntary and you may choose not to let your child participate in this research study or to withdraw your consent for your child's participation at any time. Your child may choose not to answer any questions that he or she does not want to answer. You and your child will NOT be penalized in any way should you choose not to let your child participate or to withdraw your child.
5. We will do everything we can to protect your child's privacy. Students' artifacts and all related data will be stored, digitalized and protected using a password encrypted computer. By agreeing to let your child participate, you understand and agree that your child's data may be shared with other researchers and educators in the form of presentations and/or publications. In all cases, your child's identity will not be revealed. In rare instances, a researcher's study must undergo an audit or program evaluation by an oversight agency (such as the Office for Human Research Protection). That agency would be required to maintain the confidentiality of your child's data.
6. If you have any questions or concerns regarding this study, or if any problems arise, you may call the Investigator, Jesús Daniel Díaz Peña at 314-258-1169, or by email [jddiaz@umsl.edu](mailto:jddiaz@umsl.edu) or the faculty advisor, Dr. Jacquelyn Lewis-Harris at 314-516-6023 You may also ask questions or state concerns regarding your child's rights as a research participant to the Office of Research Administration, at 516-5897.

**I have read this consent form and have been given the opportunity to ask questions. I will also be given a copy of this consent form for my records. I consent to my child's participation in the research described above.**

---

Parent's/Guardian's Signature

Date

---

Parent's/Guardian's Printed Name

---

Child's Printed Name

---

Signature of Investigator or Designee

Date

---

Investigator/Designee Printed Name

APPENDIX D: PARENTAL PERMISSION FORM-FOCUS GROUP INTERVIEWS

**Division of Teaching and Learning**



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**Informed Consent for Child Participation in Research Activities**

The importance of national identity in social studies classes in Puerto Rico: "Lo nacional" in the classroom.

Participant \_\_\_\_\_ HSC Approval Number \_\_\_\_\_ 307073-2 \_\_\_\_\_

Principal Investigator \_\_ Jesús D. Díaz Peña \_\_ PI's Phone Number \_\_\_\_\_ 314-258-1169 \_\_\_\_\_

1. Your child is invited to participate in a research study conducted by Jesús D. Díaz Peña, under the supervision of Dr. Jacquelyn Lewis-Harris. The purpose of this research is to know more about what is taught in the social studies classes in Puerto Rico, more specifically the content related to Puerto Rican national identity.

2. a) Your child's participation will involve:

➤ Focus groups:

Your child will be invited to participate in a group interview along with some of his/her classmates. During the interview, we will talk about his/her learning experience in the social studies class and the concept of national identity in the classroom. Three separate one hour interviews will be conducted between March 2012 and March 2013. The interviews will take place in the school library during the school day. Teachers have agreed that students can be removed for class for interviews. As part of the research process, I will audio record the interviews.

Approximately 18 students and 14 teachers may be involved in focus group interviews. Student and teacher participants will be recruited from two schools within the Education Region.

b) The amount of time involved in your child's participation will be no more than three hours of your child's time throughout the semester. Your child will receive a Walmart gift card for the amount of 10.00US\$ only if he/she participates in three interviews.

3. There are no anticipated risks to your child associated with this research.
4. There are no direct benefits for your child's participation in this study. However, your child's participation will contribute the development of content-rich curriculum guides and lessons for the social studies class and may help society to obtain a better comprehension of the importance of Puerto Rican national identity.
5. Your child's participation is voluntary and you may choose not to let your child participate in this research study or to withdraw your consent for your child's participation at any time. Your child may choose not to answer any questions that he or she does not want to answer. You and your child will NOT be penalized in any way should you choose not to let your child participate or to withdraw your child.
7. We will do everything we can to protect your child's privacy. By agreeing to let your child participate, you understand and agree that your child's data may be shared with other researchers and educators in the form of presentations and/or publications. In all cases, your child's identity will not be revealed. In rare instances, a researcher's study must undergo an audit or program evaluation by an oversight agency (such as the Office for Human Research Protection). That agency would be required to maintain the confidentiality of your child's data.
8. If you have any questions or concerns regarding this study, or if any problems arise, you may call the Investigator, Jesús Daniel Díaz Peña at 314-258-1169, or by email [jddiaz@umsl.edu](mailto:jddiaz@umsl.edu) or the faculty advisor, Dr. Jacquelyn Lewis-Harris at 314-516-6023. You may also ask questions or state concerns regarding your child's rights as a research participant to the Office of Research Administration, at 516-5897.

**I have read this consent form and have been given the opportunity to ask questions. I will also be given a copy of this consent form for my records. I consent to my child's participation in the research described above.**

---

Parent's/Guardian's Signature

Date

---

Parent's/Guardian's Printed Name

---

Child's Printed Name

---

Signature of Investigator or Designee

Date

---

Investigator/Designee Printed Name

APPENDIX E: ASSENT FORM



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E-mail: jddiaz@umsl.edu

**Assent to Participate in Research Activities (Minors)**

*The importance of national identity in social studies classes in Puerto Rico: "Lo nacional" in the classroom.*

1. My name is Jesús Daniel Díaz Peña.
2. I am asking you to take part in a research study because we are trying to learn more about what you think about Puerto Rican national identity in the social studies class.
3. If you agree to be in this study you will be asked to respond to a short survey three times between March 2012 and March 2013. Additionally, it is also possible that you will be selected to participate in group interviews with some of your classmates. Three separate one hour interviews will be conducted throughout the time mentioned above. The interviews will take place in the school's library and will be audio recorded. Also, I will be observing, taking notes and audio recording the social studies class in which you are enrolled no more than 10 times throughout the semester. Finally, it is also possible that I will be asking you to share school items such as your notebook, your class portfolio and/or assignments related to the social studies class.
4. There is no risk that may result from participation in the research. Being in this study should not harm you in any way.
5. You might find being in this study teaches you something about how you learn. Also, if you are selected to participate in the group interviews, you will receive a gift card for the amount of 10.00US\$ only if you complete all three group interviews. This gift card will be given to you once the last interview is completed.
6. If you don't want to be in this study, you don't have to participate. Remember, being in this study is up to you, and no one will be upset if you don't want to participate or if you change your mind later and want to stop. If you change your mind, please tell me.
7. You can ask any questions that you have about the study. If you have a question later that you didn't think of now, you can call me at 314-258-1169.

8. Signing your name at the bottom means that you agree to be in this study. You will be given a copy of this form after you have signed it.

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Participant's Printed Name

\_\_\_\_\_  
Participant's Age

\_\_\_\_\_  
Grade in School

## APPENDIX F: TEACHER QUESTIONNAIRE

### Focus Group Interview Protocol with Teachers

#### Demographics:

1. General information:

- Interviewer
- Interviewees
- Date
- Place
- Age
- Gender
- Grade level
- Religion
- Race

#### Pedagogical:

2. Tell me about your overall experience as a social studies teacher? Educator? Probe for,
- For how long have you been teaching social studies? Teaching? In the field of education?
  - What do you like the most about teaching social studies? About the field of education?
3. What is your educational philosophy as a social studies teacher? Educator?, Probe for,
- What is valuable about this philosophy?
  - If someone asks you to change your educational philosophy, how would you stand up for your educational philosophy?
  - How is this philosophy observable and tangible in your classroom practice? In your practice as an educator?
4. What motivated you to become a social studies teacher? An educator?

#### Puerto Rican identity:

5. How do you identify yourself in terms of your nationality? Probe for,
- Why do you identify yourself as such?
  - What experiences did you have that make you identify yourself as such?
6. Within the state standards of the social studies curriculum, there is an objective that states: “The social studies curriculum should help students to analyze the fundamental aspects of the historic and cultural development of Puerto Rico”. What does that mean to you as a social studies teacher? Educator?
7. How do you (would you) teach the concept of Puerto Rican identity in your social studies class? As an educator? Probe for,

- What instructional materials and activities do you use (should be used) to deliver instruction on Puerto Rican identity?
- What is it like when you teach about Puerto Rican identity?
- How can you describe students' reaction to the discussion of the topic on Puerto Rican identity?

*Opinions on Puerto Rican national identity:*

8. What direction should Puerto Rico take regarding its political relationship with the United States
  
9. What is your position regarding the political future of Puerto Rico and its status?  
Probe for,
  - How did you get to such position?
  - What political status do you favor for the island?
  - How did you come to understand that this is the best political path for Puerto Rico?
  
10. What is your opinion as to whether Puerto Ricans are a colonized population?
  
11. Puerto Rican-ness has been defined as the construct that considers the convergence of historical and sociocultural elements that identify Puerto Rico's more than 500 years of colonial subjugation, first to Spain and now to the United State with the active and prospective desire of current and future generations to reject the continuation of a colonial condition or to maintain it intact. As a social studies teacher, what would be your reaction to such statement?

How do you think students should be taught about Puerto Rican national identity?

## APPENDIX G: STUDENT QUESTIONNAIRE

### Demographics:

1. General information:
  - Interviewer
  - Interviewees
  - Date
  - Place
  - Age
  - Gender
  - Grade level
  - Religion
  - Race

### Pedagogical:

2. What is your favorite class? Probe for,
  - If the student answers the social studies class, Probe for the reason.
  - If the student answers a class other than social studies, Probe for why not social studies?
3. Tell me about your overall experience in the social studies class? Probe for,
  - Tell me about a typical day in the social studies class?
  - How do you feel about the social studies class?
  - What do you like the most about the social studies class? What do you like the least about the social studies class?
  - How do you feel about the teacher?
  - How does the teacher teach?
  - How would you describe the social studies class?
4. What have you learned in the social studies class? Probe for,
  - Why is it important to learn about that?
  - If someone asks you to explain that concept, how would you do so?
  - How important is it to learn in the social studies class?

### Puerto Rican identity:

5. What does national identity means? Probe for,
  - Where did you learn that?
  - Who taught you that?
6. How do you identify yourself in terms of your nationality? Probe for,
  - Why do you identify yourself as such?
  - What experiences did you have that make you identify yourself as such?
  - Give me an example of being.....
7. Suppose you travel to another country. How would you explain to the people of that



- country what it means to be Puerto Rican? Probe for,
- What are the characteristics of being Puerto Rican? Probe for language, geographic region, place of birth, ethnic background (Taíno, Black and Spanish) and folklore.
8. How do you feel about Puerto Ricans having American citizenship? Probe for,
- Would you explain that?

*Opinions on Puerto Rican identity and status:*

9. What have you learned in the social studies class about Puerto Rico's relationship with the United States? Probe for,
- What do you know about this relationship?
10. What is your opinion about PR's relationship with the United States? Probe for,
- What is PR's political status?
  - What political status do you favor for the island? Tell me more about that...
  - How did you come to understand that this is the best political path for Puerto Rico?
11. Some people would say that Puerto Rico is a colony of the United States. What would you tell them?
12. Are you finding PR's relationship with the United States different from that of other countries?

## APPENDIX H: STRENGTH OF IDENTIFICATION SCALE (SOIS)

### Instructions

The purpose of this survey is to measure how strongly individuals identify with their national identity. Your responses will be strictly confidential and the data collected through the survey will be strictly employed for the purpose of the study. Responding to this survey is estimated to take no more than 5 minutes of your time. There are no correct or wrong answers, please answer the following questions to the best of your ability. Raise your hand as soon as you are done.

### Part I: General information.

- 1) \_\_\_\_\_ **Age:**
  
- 2) \_\_\_\_\_ **Gender:**
  - a. Female
  - b. Male
  
- 3) \_\_\_\_\_ **Family's social class:**
  - a. Upper class
  - b. Upper middle class
  - c. Lower middle class
  - d. Working class
  - e. Lower class
  
- 4) \_\_\_\_\_ **Rate your level of academic achievement:**
  - a. Excellent
  - b. Above average
  - c. Average
  - d. Poor
  - e. Very poor

**Part II: Strength of Identification**

1) \_\_\_\_\_ **How Puerto Rican do you feel?**

<b>Very Puerto Rican</b>						<b>Not at all Puerto Rican</b>
7	6	5	4	3	2	1

2) \_\_\_\_\_ **How proud are you of being Puerto Rican?**

<b>Very proud</b>						<b>Not at all proud</b>
7	6	5	4	3	2	1

3) \_\_\_\_\_ **How important is it to you that you are Puerto Rican?**

<b>Very important</b>			<b>Neither important nor unimportant</b>			<b>Very unimportant</b>
7	6	5	4	3	2	1

4) \_\_\_\_\_ **how do you feel about being Puerto Rican?**

<b>Very happy</b>			<b>Neither happy nor sad</b>			<b>Very sad</b>
7	6	5	4	3	2	1

5) \_\_\_\_\_ **How you would feel if someone said something bad about Puerto Rican people?**

<b>Very happy</b>			<b>Neither happy nor sad</b>			<b>Very sad</b>
7	6	5	4	3	2	1

APPENDIX I: PUERTO RICO'S DEPARTMENT OF EDUCATION  
AUTHORIZATION TO CONDUCT RESEARCH ACTIVITIES



ESTADO LIBRE ASOCIADO DE PUERTO RICO  
DEPARTAMENTO DE EDUCACION  
REGION EDUCATIVA DE CAGUAS  
CAGUAS, PUERTO RICO

OFICINA DE LA DIRECTORA

18 de enero de 2012

Sr. Jesús D. Díaz Peña  
Estudiante  
University of Missouri, St. Louis  
College of Education  
Connecting Human Origin and Cultural Diversity Group  
E. Desmond Lee Technology and Learning Center

Estimado señor Díaz:

Saludos. Luego de cotejar los documentos sometidos para el visto bueno acerca de la



los requisitos establecidos en la Carta Circular 45-2001-2002 del Departamento de Educación.

Por tal razón, se autoriza a llevar a cabo el estudio antes mencionado para los estudiantes de séptimo grado, en la materia de Estudios Sociales de las Escuelas John F. Kennedy (Distrito Escolar de Gurabo – Municipio de Caguas) y Ramón E. Betances (Distrito Escolar de Cidra – Municipio de Cayey). A estos efectos, es importante señalar, que debe coordinar con los superintendentes a cargo de dichos distritos y con los directores de dichas escuelas, al igual que con los padres o encargados, para llevar a cabo el proceso sin afectar el tiempo lectivo. Además, le solicitamos que haga llegar a nuestra oficina copia de los resultados de la investigación.

Agradeceré su atención al respecto.

Cordialmente,



Evelyn Díaz Suárez  
Directora Regional

EM08/yjw

APPENDIX J: OFFICE OF RESEARCH ADMINISTRATION: IRB APPROVAL



Office of Research Administration

One University Boulevard  
St. Louis, Missouri 63121-4400  
Telephone: 314-516-5800  
Fax: 314-516-6750  
E-mail: ora@umsl.edu

DATE: January 26, 2012

TO: Jesús Daniel Díaz Peña, MEd  
FROM: University of Missouri-St. Louis IRB

PROJECT TITLE: [257993-1] Social Studies classes in Puerto Rico: The Importance of national Identity in the classroom.

REFERENCE #:  
SUBMISSION TYPE: New Project

ACTION: APPROVED  
APPROVAL DATE: January 26, 2012  
EXPIRATION DATE: January 26, 2013  
REVIEW TYPE: Expedited Review

REVIEW CATEGORY: Expedited review category # 7

The chairperson of the University of Missouri-St. Louis IRB has reviewed the above mentioned protocol for research involving human subjects and determined that the project qualifies for expedited review under Title 45 Code of Federal Regulations Part 46.110b. The time period for this approval expires one year from the date listed below. You must notify the University of Missouri-St. Louis IRB in advance of any proposed major changes in your approved protocol, e.g., addition of research sites or research instruments.

You must file an annual report with the committee. This report must indicate the starting date of the project and the number of subjects to date from start of project, or since last annual report, whichever is more recent.

Any consent or assent forms must be signed in duplicate and a copy provided to the subject. The principal investigator must retain the other copy of the signed consent form for at least three years following the completion of the research activity and they must be available for inspection if there is an official review of the UM-St. Louis human subjects research proceedings by the U.S. Department of Health and Human Services Office for Protection from Research Risks.

This action is officially recorded in the minutes of the committee.

If you have any questions, please contact Carl Bassi at 314-516-6029 or [bassi@umsl.edu](mailto:bassi@umsl.edu). Please include your project title and reference number in all correspondence with this committee.

APPENDIX K: OFFICE OF RESEARCH ADMINISTRATION: AMENDMENT



**Office of Research Administration**

One University Boulevard  
St. Louis, Missouri 63121-4499  
Telephone: 314-516-5899  
Fax: 314-516-6759  
E-mail: ora@umsl.edu

**DATE:** April 4, 2012

**TO:** Jesús Díaz-Peña, MEd  
**FROM:** University of Missouri-St. Louis IRB

**PROJECT TITLE:** [307073-2] The Importance of national Identity in Social Studies classes in Puerto Rico: An examination of teachers' and students' perceptions about "lo nacional".

**REFERENCE #:**  
**SUBMISSION TYPE:** Amendment/Modification

**ACTION:** APPROVED  
**APPROVAL DATE:** April 4, 2012  
**EXPIRATION DATE:** March 15, 2013  
**REVIEW TYPE:** Full Committee Review

This proposal was approved by the University of Missouri-St. Louis IRB for a period of one year starting from the date listed above. The University of Missouri-St. Louis IRB must be notified in writing prior to major changes in the approved protocol. Examples of major changes are the addition of research sites or research instruments.





An annual report must be filed with the committee. This report should indicate the starting date of the project and the number of subjects since the start of project, or since last annual report.

Any consent or assent forms must be signed in duplicate and a copy provided to the subject. The principal investigator is required to retain the other copy of the signed consent form for at least three years following the completion of the research activity and the forms must be available for inspection if there is an official review of the UM-St. Louis human subjects research proceedings by the U.S. Department of Health and Human Services Office for Protection from Research Risks.

This action is officially recorded in the minutes of the committee.

If you have any questions, please contact Carl Bassi at 314-516-6029 or [bassi@umsl.edu](mailto:bassi@umsl.edu). Please include your project title and reference number in all correspondence with this committee.

APPENDIX L: 2012 PLEBISCITE, SAMPLE OF OFFICIAL BALLOT

<p><b>PAPELETA OFICIAL</b> <i>OFFICIAL BALLOT</i></p> <p><b>MODELO</b></p>	 <p><b>GOVERNMENT OF PUERTO RICO</b> <b>GOBIERNO DE PUERTO RICO</b></p> <p><b>MAÑANA, 6 DE NOVIEMBRE DE 2012</b> <b>TUESDAY, NOVEMBER 6, 2012</b></p>	<p><b>CONSULTA</b> <i>PLEBISCITE</i></p> <p><b>SAMPLE</b></p>
<p><b>CONSULTA SOBRE EL ESTATUS POLÍTICO DE PUERTO RICO</b> <b>PLEBISCITE ON PUERTO RICO POLITICAL STATUS</b></p>		
<p><b>Instrucciones:</b> Marque la opción de su preferencia. La papeleta con más de una (1) opción marcada en esta sección no será contabilizada. <i>Instructions:</i> Mark your option of preference. Those ballots with more than one (1) mark in this section shall not be tallied.</p>		
<p><b>¿Está usted de acuerdo con mantener la condición política territorial actual?</b> <i>Do you agree that Puerto Rico should continue to have its present form of territorial status?</i></p>		
<p><b>Sí / Yes</b> _____</p>		<p><b>No / No</b> _____</p>
<p><b>Instrucciones:</b> Irrespectivamente de su contestación a la primera pregunta, conteste cuál de las siguientes opciones no territoriales usted prefiere. <i>Instructions:</i> Regardless of your selection in the first question, please mark which of the following non-territorial options would you prefer.</p> <p>La consulta con más de una (1) opción marcada en esta sección no será contabilizada. <i>Those ballots with more than one (1) mark in this Section shall not be tallied.</i></p>		
 <p><b>Estadidad:</b> Prefiero que Puerto Rico sea un estado de Estados Unidos de América, para que todos los ciudadanos americanos residentes en Puerto Rico tengan iguales derechos, beneficios y responsabilidades que los demás ciudadanos de los estados de la Unión, incluyendo derecho a la plena representación en el Congreso y participación en las elecciones presidenciales, y que se requiera al Congreso Federal que promulgue la legislación necesaria para iniciar la transición hacia la estadidad. Si está de acuerdo marque aquí:</p> <p><b>Statehood:</b> <i>Puerto Rico should be admitted as a state of the United States of America so that all United States citizens residing in Puerto Rico may have rights, benefits, and responsibilities equal to those enjoyed by all other citizens of the states of the Union, and be entitled to full representation in Congress and to participate in the Presidential elections, and the United States Congress would be required to pass any necessary legislation to begin the transition into Statehood. If you agree, mark here:</i></p> <p>_____</p>	 <p><b>Independencia:</b> Prefiero que Puerto Rico sea una nación soberana y totalmente independiente de Estados Unidos y que se requiera al Congreso Federal que promulgue la legislación necesaria para iniciar la transición hacia la nación independiente de Puerto Rico. Si está de acuerdo marque aquí:</p> <p><b>Independence:</b> <i>Puerto Rico should become a sovereign nation, fully independent from the United States and the United States Congress would be required to pass any necessary legislation to begin the transition into independent nation of Puerto Rico. If you agree, mark here:</i></p> <p>_____</p>	 <p><b>Estado Libre Asociado Soberano:</b> Prefiero que Puerto Rico adopte un estatus fuera de la Cláusula Territorial de la Constitución de Estados Unidos, que reconozca la soberanía del Pueblo de Puerto Rico. El Estado Libre Asociado Soberano se basaría en una asociación política libre y voluntaria, cuyos términos específicos se acordarían entre Estados Unidos y Puerto Rico como naciones soberanas. Dicho acuerdo dependería el alcance de los poderes jurisdiccionales que el pueblo de Puerto Rico autorice dejar en manos de Estados Unidos, reteniendo los restantes poderes o autoridades jurisdiccionales. Si está de acuerdo, marque aquí:</p> <p><b>Sovereign Free Associated State</b> <i>Puerto Rico should adopt a status outside of the Territory Clause of the Constitution of the United States that recognizes the sovereignty of the People of Puerto Rico. The Sovereign Free Associated State would be based on a free and voluntary political association, the specific terms of which shall be agreed upon between the United States and Puerto Rico as sovereign nations. Such agreement would provide the scope of the jurisdictional powers that the People of Puerto Rico agree to confer to the United States and retain all other jurisdictional powers and authorities. If you agree, mark here:</i></p> <p>_____</p>



APPENDIX M: 2017 PLEBISCITE, SAMPLE OF OFFICIAL BALLOT

  
GOBIERNO DE PUERTO RICO  
GOVERNMENT OF PUERTO RICO  
11 de junio de 2017 / June 11, 2017

**PLIEGUITO Y PAPELITA / PLEBISCITE AND BALLOT**  
**PLIEGUITO PARA LA DISECCIONADO INMEDIATA DE PUERTO RICO**  
**PLIEGUITO FOR THE IMMEDIATE DISMEMBERMENT OF PUERTO RICO**

**INSTRUCCIONES AL ELECTOR**

El elector sólo puede marcar y votar una (1) alternativa de estatus político no territorial y no colonial en esta papelita. Debe hacer una marca visible dentro del recuadro que aparece debajo de la figura geométrica de la alternativa de estatus político de su preferencia. En esta papelita usted tiene derecho a seleccionar sólo una alternativa de estatus no territorial y no colonial. La papelita marcada por más de una alternativa de estatus no territorial no será válida. Cualquier elector o cualquier sujeta de uno de los recuadros será considerado fraudulentamente. Toda papelita marcada en blanco, así como la que no está clasificada como papelería adjudicada en los resultados oficiales que certifique la Comisión Estatal de Elecciones, según la jurisprudencia del Tribunal Supremo de Puerto Rico.

**INSTRUCTIONS FOR THE VOTER**

The voter can only choose and mark one (1) alternative of non-territorial and non-colonial political status on this ballot. You must make a valid mark inside the square that appears below the geometric figure of the alternative of political status of your preference. In this ballot you have the right to choose only one non-territorial and non-colonial alternative. The ballot marked with more than one status alternative will be considered corruptly voted. Any elector or voting subject of the recuadros will be considered fraudulently. If the ballot was marked for more than one alternative, it will not be accounted in the official results certified by the State Elections Commission, according to the jurisprudence of the Supreme Court of Puerto Rico.

**AFIRMACIÓN DEL ELECTOR**

DECLARO al Gobierno de los Estados Unidos la renuncia del acuerdo territorial y colonial durante 100 años, incluyendo a Puerto Rico de cualquier modalidad a interpretación jurídica de la "Cláusula Territorial" de la Constitución Federal y con la implementación de la alternativa de estatus político final, permanente, no territorial y no colonial siguiente:

**AFFIRMATION OF THE VOTER**

I CLAIM to the Government of the United States the renunciation of territorial and colonial provisions for 100 years, including Puerto Rico from any modality or legal interpretation of the "Territorial Clause" of the U.S. Constitution and with the implementation of the following final, permanent, non-territorial and non-colonial political status alternative:

 <input type="checkbox"/> <b>ESTADIDAD</b> Statehood	 <input type="checkbox"/> <b>LIBRE ASOCIACIÓN/INDEPENDENCIA</b> Free Association/Proclamation of Independence
--	--

Con mi voto, ratifico mi petición al Gobierno Federal para comenzar de inmediato el proceso de descolonización de Puerto Rico con la admisión de Puerto Rico como estado de la Unión de los Estados Unidos de América. Soy consciente de que el resultado de esta petición de Estadidad, conllevará iguales derechos y deberes con los demás estados, y la unión permanente de Puerto Rico con los Estados Unidos de América. Soy consciente, además, que mi reconocimiento de la Estadidad significa mi apoyo a toda gestión dirigida a la admisión de Puerto Rico como un estado de la Unión y a toda legislación estatal o federal dirigida a establecer la igualdad de condiciones, la Representación Congresional y el voto Presidencial para los ciudadanos americanos de Puerto Rico. Estoy consciente, que la Estadidad es la única opción que garantiza la ciudadanía americana por nacimiento en Puerto Rico.

With my vote, I reiterate my request to the Federal Government to immediately begin the process of the decolonization of Puerto Rico with the admission of Puerto Rico as a state of the United States of America. I am aware that the result of this request for Statehood would entail equal rights and duties with the other states, and the permanent union of Puerto Rico with the United States of America. I am also aware that my vote claiming Statehood means my support to all efforts towards the admission of Puerto Rico as a state of the Union, and to all state or Federal legislation aimed at establishing equal conditions, Congressional Representation and the Presidential Vote for the American Citizens of Puerto Rico. I am aware that Statehood is only option that guarantees the American citizenship by birth in Puerto Rico.

Con mi voto ratifico la primera petición al Gobierno Federal para comenzar el proceso de descolonización a través de (2) "Libre Asociación", prefiero que Puerto Rico adopte un estatus fuera de la cláusula territorial de la Constitución de los Estados Unidos, que reconozca la soberanía del pueblo de Puerto Rico. La Libre Asociación se basa en una asociación política libre y voluntaria, cuyos términos específicos se acordarán entre Estados Unidos y Puerto Rico como naciones soberanas. Dicho acuerdo dependerá del acuerdo de los poderes jurisdiccionales que el pueblo de Puerto Rico decide dejar en manos de Estados Unidos y retendrá los restantes poderes o autoridades jurisdiccionales. Bajo esta opción la ciudadanía americana estará sujeta a negociación con el Gobierno de los Estados Unidos o (2) la Proclamación de la "Independencia", demandó al Gobierno de los Estados Unidos que, en el ejercicio de su poder para disponer del territorio, reconozca la soberanía nacional de Puerto Rico como una nación totalmente independiente y que el Congreso Federal promueva la legislación necesaria para iniciar la negociación y la transición hacia la nación independiente de Puerto Rico. Mi voto por la Independencia representa, además, el reclamo de los derechos, deberes, poderes y prerrogativas de las repúblicas independientes y democráticas; mi apoyo a la ciudadanía puertorriqueña; y a un "Tratado de Amistad y Cooperación" entre Puerto Rico y los Estados Unidos con posterioridad al proceso de transición.

With my vote, I make the third request to the Federal Government to begin the process of the decolonization through (1) Free Association. Puerto Rico should adopt a status outside of the Territory Clause of the Constitution of the United States that recognizes the sovereignty of the People of Puerto Rico. The Free Association would be based on a free and voluntary political association, the specific terms of which shall be agreed upon between the United States and Puerto Rico as sovereign nations. Such agreement would provide the scope of the jurisdictional powers that the People of Puerto Rico agree to confer to the United States and retain all other jurisdictional powers and authorities. Under this option the American citizenship would be subject to negotiation with the United States Government; (2) Proclamation of Independence, I demand that the United States Government, in the exercise of its power to dispose of territory, recognize the national sovereignty of Puerto Rico as a completely independent nation and that the United States Congress enact the necessary legislation to initiate the negotiation and transition to the independent nation of Puerto Rico. My vote for Independence also represents my claim to the rights, duties, powers, and prerogatives of independent and democratic republics, my support of Puerto Rican citizenship, and a "Treaty of Friendship and Cooperation" between Puerto Rico and the United States after the transition process.

De now to que la "Libre Asociación/Independencia" adopte la mayoría de votos válidos en este Plebiscito, cualquier ciudadano/a americano/a no residente en el día anterior de 2017, no será papelería sujeta a adjudicación en los resultados oficiales de "Libre Asociación" y "Independencia".



## APPENDIX N: SAMPLE OF CODES

HU: JDDIAZ-DISSERTATION  
File: [C:\Users\Jesús\Dropbox\DOCTORAL PROGRAM\MATERIALES DE TESIS\DISSERTA...JDDIAZ-DISSERTATION.hpr6]  
Edited by: Super  
Date/Time: 2017-03-29 16:54:36

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África  
background knowledge activation  
castigo  
Catholic  
Catholicism  
Columbus  
comentario en contra de administración de gobierno  
contexto político de la isla  
copiar  
critical thinking  
cultural element  
currículo  
definición de conceptos  
dictation  
ejemplo  
ejemplo de everyday life  
element of national identity  
elemento de identidad nacional  
Esclavos africanos  
example of topic in class  
folklore  
formative assessment  
frustración del maestro  
geografía  
id of concepts  
Important historical figure  
Intención del maestro  
Interdisciplinary  
Interrupción  
lectura  
libreta  
libro  
maestro explica  
mandato  
materiales  
Meditación  
mix  
negritud  
new class topic  
niveles de aprovechamiento  
pensamiento crítico  
pereza  
Pizarra  
Pregunta de estudiantes  
preguntas  
preguntas y respuestas  
race  
religion  
religión  
respuestas  
school materials

**servitude**  
**slavery**  
**slaves to America**  
**Socratic method**  
**Spanish class**  
**summative assessment**  
**taínos**  
**teacher voice**  
**teacher's opinion**  
**telling students what to do**  
**Tema de la clase**  
**Tema de la clase**  
**types of slaves**  
**vocabulario**  
**voz del maestro**  
**West Africa**  
**what happened last class**  
**atención**

APPENDIX O: TRANSLATION OF MR. RAMIREZ'S CLASS

<p>fue sacada del país por sus ideales. Tú sabes que usted se sienta bien patriótica, que usted quiera a su patria libre y a usted la saquen del país porque usted es un atentado para la nación. Un ejemplo, para aquel tiempo era española y miren, no simplemente española, esto nuevo se vive con las carpetas, con la nación norteamericana. Dos sucesos bien parecidos, escuche para que se eduque, dos sucesos bien parecidos lo vivimos con los españoles con el Grito de Lares donde se destierra a todas aquellas personas que aman a Puerto Rico porque defienden su libertad son desterrados y alejados de la isla. Es como si yo le dijera a Judith ahora mismo recoge tus cosas, te tienes que ir porque si no te van a meter presa de por vida por lo que tú piensas. Tú piensas que quieres ver a Puerto Rico libre, no asociado con los Estados Unidos y eso es atentar contra la asociación de Puerto Rico y Estados Unidos y te mandan a vivir afuera, mira, hello, te mandan a vivir afuera, tienes que dejar a tu familia, a tu mamá, a tu papá, etc., y desde afuera donde de donde te enviaron tú vas a seguir luchando por tus ideales y vas a seguir luchando y esto fue la experiencia que vivieron estas personas. No simplemente ella, un sinnúmero de líderes y esto también se va a dar con la nación norteamericana. La nación norteamericana perseguía a todos aquellos que atentaban contra la asociación norteamericana que eran los independentistas e hicieron una carpeta para luego más tarde ustedes estudiaron lo que fueron las carpetas. La carpeta era donde te ponían está en el baño ahora bañándose, salió para una</p>	<p>she was taken outside the country. You know what it feels like to be a patriot, to aspire for the freedom of your country, but then you are taken out of the country because you are considered a threat to your nation. For example, at that time the Spanish did it, but then this happens again with the files under the American government. Two similar events, and listen up so you educate yourself, two events we lived under Spanish domination with el Grito de Lares where the people who loved Puerto Rico experienced exile far away from the island because they chose to defend their freedom. Is like telling Judith to gather her things, you have to leave now otherwise you go to jail for life. If you believe that Puerto Rico should be free, and should not be in association with the U.S., that is a flout against Puerto Rico and the U.S. and they can send you into exile. Then you have to leave your family, your mom, your dad, etc. In exile, you might keep fighting for your own ideas, and this is the experience of some of this people. Not only her, but a great number of leaders under the American government. Americans profiled every individual who expressed dissatisfaction with the relationship with the U.S. especially independence supporters who experienced persecution. The “files” [las carpetas] were used to track your movements like everytime you go to the bathroom, she went to a meeting, she is in association with certain people, she is doing this, she is doing that. The carpetas were like a journal they kept a detailed record of your activities.</p>
---	---

<p>reunión con fulano de tal y fulano de tal, está haciendo esto... Todo eso era como tu vida en un diario donde alguien te estaba investigando que tú hacías y qué dejabas de hacer.</p>	
---	--