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Fidelity of Implementation of a Balanced Literacy Program in the Elementary Classroom

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Walden University
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Abstract

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by

Shalonda Young

MA, Converse College, 2003

BS, University of South Carolina Upstate, 2001

Project Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

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Abstract

The local problem is that literacy in the target school district continues to rank below the state average and the fidelity of implementation (FOI) of balanced literacy (BL) has not been addressed since BL was initiated in 2014 to address student literacy achievement. Teachers reported limited professional development (PD) and lack of motivation to implement BL as designed. The purpose of this basic qualitative research study was to explore elementary English language arts (ELA) teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Using Carroll et al.'s implementation fidelity and Duda and Wilson's formula for success frameworks, the research questions focused on how teachers perceived the FOI of a BL program in the ELA classrooms and how support staff personnel perceived they have supported the FOI of the BL program in the ELA classrooms. Interviews were conducted with a purposeful sample that included eight third through fifth grade ELA elementary teachers who actively participated in the BL implementation process and two support staff personnel who met the selection criteria. A modified van Kaam method of analysis was used to code and analyze the data. Findings indicated that BL FOI needs to be improved and the need for additional PD training on BL for teachers and support staff personnel. A 3-day BL PD project was developed for teachers and support staff personnel. The implications for positive social change include concrete benefit to the district leadership as the product provided may facilitate needed changes by developing capacity building in the district using five teacher cadre teams and the findings may prompt further study of BL implementation by district staff.

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Dedication

A quote from Mark Hansen states, "Each one, reach one. Each one, teach one. Until all are taught." Lord knows, this have been a teachable process because I have endured many obstacles to become Dr. Shalonda Young. Foremost, I want to first thank God Almighty and my church family, including formal pastors, who have continued to encourage the importance of education to youths. They have instilled the importance of having a positive attitude and by giving God everything, he will provide the rest.

I want to thank my amazing husband, Daniel Young, for his steadfast, unwavering, support, prayers, and love for me throughout this process. Daniel, along with our children, Demond and Destini, have been my biggest cheerleaders and supporters. Their love, accountability, energy, and support have been key in helping me to make it to this stage. I also would like to thank my bonus daughters in love, Chanel Young and Emajha Graves, for stepping in and babysitting their baby siblings when mama needed time to complete her doctoral work. Destini and Demond, please note that I went through this process to prove that you can persevere and be anything in life.

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I would like to acknowledge my Lord Jesus Christ for giving me the strength and ability to persevere through this doctoral journey. Without him, I would not have succeeded. I want to acknowledge God for allowing me to have the mind to continue to work and fulfill my lifetime dream of getting my doctoral degree. Without God, I am nothing. I dreamed of getting a doctoral degree since I was a little girl and being called Dr. Young. Now, I am Dr. Young after this tremendous process.

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Table of Contents

List of Tables

List of Figures

Section 1: The Problem

The requirements of state-mandated assessment systems and the No Child Left Behind Act of 2002 resulted in major district and individual school efforts in my district that focused on the alignment of the curriculum with the state standards (Protheroe, 2008). Every Student Succeeds Act (ESSA) is the reaffirmation of the Elementary and Secondary Education School Act, which was signed by President Obama on December 10, 2015 (U.S. Department of Education, 2016). ESSA is an update to the No Child Left Behind Act, and it reauthorizes President Johnson's 1965 Elementary and Secondary Education Act (U.S. Department of Education, 2016). Protheroe (2008) reported that normally, district and school efforts started with creating aligned curricula focused on what will be taught, which is then followed by the development of pacing guides that stipulated when certain skills and content would be covered. However, there are times when attention is given to how lessons were to be taught. Protheroe explained that most often, the decision about how lessons were going to be taught occurred when schools or districts embraced a program that research findings indicated had a positive effect on student achievement, such as specific curriculum or instructional strategy. Thus, the goal was to use information about what was successful and choose a specific approach with the intent to help students learn the required content and skills (Protheroe, 2008). However, Protheroe warned that programs or practices that are effective in one setting may be ineffective in other settings if the way they are being implemented does not align with its original design, which refers to fidelity of implementation (FOI).

Fidelity is necessary and important for understanding the characteristics of an intervention, such as research-based curriculum, because it can act as a possible moderator of the relationship between an intervention and its planned or intended outcomes, such as increasing student achievement (Moon & Park, 2016). It is also vital to assess fidelity to prevent possible false conclusions being made about an intervention's effectiveness (Moon & Park, 2016), such as the balanced literacy (BL) program. The North Carolina Department of Public Instruction's (NCDPI) literacy framework includes the BL approach, which is geared towards improving elementary school students' literacy achievement (Public Schools of Robeson County, 2018). The NCDPI allowed school districts to develop their own BL practices and implementation procedures (Charlotte-Mecklenburg Schools [CMS], 2018; Public Schools of Robeson County, 2018). With the NCDPI allowing school districts to choose how they implemented and trained teachers regarding BL, English language arts (ELA) teachers may have received little guidance on how BL should be implemented effectively. As a result, teachers may lack sufficient knowledge to implement the BL framework with fidelity, which may lead to ineffective BL implementation in their classrooms. Therefore, the purpose of this basic qualitative research study was to assess ELA teachers' and support staff personnel's perceptions of the fidelity of implementing the BL model in the ELA classrooms in relation to the original intended design. Elementary ELA teachers and support staff personnel are defined as educators; therefore, they are one population.

In Section 1 of this project study, I include the local problem, rationale, definition of terms, significance of the study, and research questions. In addition, I include a review

of the literature, where I address the literature search strategy, conceptual framework, a review of the broader problem. Furthermore, I include the implications and a summary.

The Local Problem

Cityside School District (pseudonym for the school district used in this study) reading end-of-grade (EOG) proficiency level for the 2018-2019 academic school year was 46.3% compared to the state at 50.4% as measured by the state accountability assessment and reported on the North Carolina Report Cards (North Carolina Public Schools, 2019). Therefore, the district proficiency level (46.3%) was lower than the state proficiency level (50.4%; North Carolina Public Schools, 2019). The district leadership implemented BL in 2014 to address the elementary student literacy issue. A district superintendent in North Carolina stated that the district's reading priority is to improve student literacy by implementing BL as intended (personal communication, August 21, 2018). Current researchers and theorists suggest the need for a balanced or a comprehensive approach to literacy instruction to improve students' literacy (Bingham & Hall-Kenyon, 2013; Fitzgerald, 1999; McCardle et al., 2001; Rasinski & Padak, 2004).

Teachers were provided with professional development (PD) to support BL implementation (personal communication, August 21, 2018). However, teachers continue to struggle with the implementation of BL (Meidl & Lau, 2017; Moon & Park, 2016; Policastro, 2018). Policastro (2018) reported that many teachers and support staff personnel are uncertain of what BL actually is and how it is delivered in classrooms across their school. In addition, Policastro noted that the demand placed on principals, other academic leaders, teachers, literacy coaches, and other academic staff members in

relation to assessments, standards, and student progress, has drastically increased over the years. PD that is targeted for student needs or BL has been effective in supporting teachers to implement the BL components or processes (Bartlett, 2017; Policastro, 2018). However, the district leadership has not evaluated the BL program regarding FOI and whether the BL program has been implemented as designed, nor whether PD has managed to meet the needs of the teachers in implementing BL (personal communication, August 21, 2018).

The local problem is that literacy in the target district elementary schools continue to rank below the state average and the FOI of BL since it was initiated in 2014 to address student literacy achievement. The low scores have caused concern for administrators in the target district elementary schools. Evidence from local school officials via annual teacher evaluations and teacher and principal communications support that FOI of the BL program is a problem. Support staff personnel, which includes administrators, want to know how teachers are implementing the BL program with fidelity; this is the main problem that I investigated in this basic qualitative research study. I explored elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Table 1 shows a list of the five main reading and four main writing components that should be included in an effective BL program (Learning A-Z, 2018; Policastro, 2018; West Orange Board of Education [WOBOE], 2016).

Table 1

Balanced Literacy Approach to Reading and Writing

Reading components	Writing components
Shared reading	Modeled writing
Interactive read aloud	Shared/interactive writing
Independent daily reading	Guided writing
Small group instruction or guided reading (guided reading, partner reading, skills groups, book clubs, and conferences)	Independent writing
Word study (phonics, grammar, mechanics, spelling, and vocabulary)	

Rationale

In this section, I present the rationale or justification for the problem choice and who thinks BL implementation is a problem. This section is organized in the following subsections: evidence of the problem at the local level and evidence of the problem from the professional literature.

Evidence of the Problem at the Local Level

Cityside School District is in the State of North Carolina. According to current data from Cityside School District, there were approximately 148,299 students in kindergarten (K) through 12th grade during the 2019-2020 academic school year. The student district population was 27.6% Caucasian, 37.5% African American, 25% Hispanic, and 6.9% Asian during the 2018-2019 academic school year (Glenn, 2018). County Health Rankings (2020) reported that 58% of students in Cityside School District are eligible for free or reduced-price lunch. However, data indicated that more than 50% of students at Cityside School District are economically disadvantaged, whereas 49.2% of

students are economically disadvantaged across the State of North Carolina (Helms, 2018; North Carolina School Report Cards, 2018). The school district literacy proficiency level for 2018-2019 was 53.2% compared to the state at 56.0% as measured by the state accountability assessment and reported on the North Carolina Report Cards (North Carolina Public Schools, 2019). Tables 2, 3, and 4 show the third, fourth, and fifth grade reading EOG performance by proficiency level by district and state, respectively (North Carolina Public Schools, 2019). Table 5 shows the overall reading EOG performance by proficiency level by district and state (North Carolina Public Schools, 2019). The district 2018-2019 proficiency level (53.2%) was lower than the state (56.0%).

Table 2

Third Grade Reading End-of Grade Performance by Proficiency Level by District and State

Year	District proficiency	State proficiency
2016-2017	58.4%	57.8%
2017-2018	56.1%	55.9%
2018-2019	57.3%	56.8%

Table 3

Fourth Grade Reading End-of-Grade Performance by Proficiency Level by District and State

Year	District proficiency	State proficiency
2016-2017	57.3%	57.7%
2017-2018	56.8%	57.8%
2018-2019	52.5%	57.3%

Table 4

Fifth Grade Reading End-of-Grade Performance by Proficiency Level by District and State

Year	District proficiency	State proficiency
2016-2017	56.5%	56.6%
2017-2018	50.2%	54.1%
2018-2019	50.0%	54.1%

Table 5

Overall Reading End-of-Grade Performance by Proficiency Level by District and State

Year	District proficiency	State proficiency
2016-2017	57.4%	57.3%
2017-2018	54.4%	55.9%
2018-2019	53.2%	56.0%

Support staff personnel implemented BL with the intention that it would improve student reading achievement (personal communication, August 21, 2018). Because student achievement in reading at the target school district has not shown enough academic growth since the implementation of the BL (personal communication, August 21, 2018), it is not known whether the BL program is being delivered effectively or whether ELA teachers are not receiving effective PD for BL implementation. Because the students at the target school district have not made substantial improvements in reading since the implementation of BL, the problem may be associated to the FOI in the classroom by ELA teachers.

Support staff personnel implemented BL PD to improve the literacy skills of students in the target school district. ELA teachers have expressed a lack of understanding about the BL implementation process (personal communication, August 30, 2016). Teachers reported that support staff personnel have not thoroughly explained the components necessary to teach BL due to the limited amount of time available for PD and allotment of teaching time in the classroom (personal communication, August 30, 2016). All teachers were not provided with a consistent sequence of BL PD sessions to implement the BL as designed, which varied in number of hours and content (personal communication, December 14, 2016). A teacher shared that due to limited PD and lack of understanding, she was not motivated to implement the processes and procedures of BL (personal communication, December 21, 2016). If BL is not being used effectively, then students may not show improvement in their reading abilities.

Cityside School District implemented BL in 2014 and provided PD, but the district leadership has not evaluated the program in terms of FOI and whether the BL program is being implemented as intended or designed, nor whether PD has been successful in meeting the needs of the teachers to implement the BL program (personal communication, August 21, 2018). To eliminate implementation issues, the concept of FOI should be explored to determine if the delivery of BL had been implemented as it was designed. The problem is evidenced with Cityside School District students in Grades 3 through 5 as the reading EOG proficiency for Grades 3 through 5 have consistently decreased for academic years 2016-2017 (57.4%), 2017-2018 (54.4%), and 2018-2019 (53.2%). When multiple school sites are implementing an innovation or new strategy, there may be different levels of success due to varying degrees of program integrity (Duerden & Witt, 2012). The purpose of basic qualitative research study was to explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design.

Evidence of the Problem From the Professional Literature

FOI refers to whether the elements of an intervention, program, or process is being implemented as originally intended according to research-based guidelines and best practices (Keller-Margulis, 2012; McKenna et al., 2014). When implementing a school program such as BL, it is important to determine if teachers and support staff personnel are implementing the program as intended or if changes are needed to align implementation with the original instructional design (McKenna et al., 2014).

Implementation of any programs or interventions such as the BL program should be carried out with fidelity if positive results are to be expected (Protheroe, 2008). Administrators and teachers are constantly searching for innovative ways to help students achieve academically (O'Donnell, 2008). If the program is not carried out as intended, then the program may not produce the preferred result (Carroll et al., 2007).

Implementing innovative or original programs in the classroom is still a major challenge (Moon & Park, 2016), such as the implementation of the BL program. Policastro (2018) reported that many teachers and support staff personnel are uncertain of what BL actually is and how it is delivered in classrooms across the school. The demand placed on principals, other academic leaders, teachers, literacy coaches, and other academic staff members in relation to assessments, standards, and student progress, has drastically increased over the years (Policastro, 2018). Meidl and Lau (2017) reported that educational leadership programs and PD opportunities normally do not include development pertaining to literacy knowledge and trends, literacy coaching, or literacy leadership. However, many school leaders are striving to use best practices in literacy pedagogy as a catalyst for transformative change (Policastro, 2018).

Research focusing on instructional strategies is critical in education, particularly when implementation is susceptible to real-world classroom and school challenges (Boardman et al., 2016). Boardman et al. (2016) related that general education teachers in secondary school settings are being directed to integrate more demanding expository or informational text reading in their content classroom. Boardman et al. further noted that teachers are also being asked to give instruction that enhances reading skills and content

learning, which should be distinguished to meet the needs of students with different content knowledge and reading abilities. However, these instructional goals are cumbersome, and many teachers do not feel prepared for the obstacles they face in classrooms and schools that have insufficient support and resources (Boardman et al., 2016). Boardman et al. related that researchers have found support for instructional models being used, to include reading supports and effective instruction features within content learning. However, Boardman et al. explained that students, including those with disabilities in general educational classrooms, often get instruction that is tailored towards all students and is not discerned to meet their learning needs. Therefore, Boardman et al. recommended that linking the research to practice gap will require PD facilitators to fully comprehend the implementation features that are related to enhancing student outcomes.

There are often difficult challenges in relation to providing and implementing ongoing and systematic PD that creates a path forward in schools (Policastro, 2018). Policastro (2018) discussed leadership role demands that include a schoolwide increase in teachers' professional capacity, keen focus on student learning to consistently raise student achievement, and strong teamwork with clear and agreed upon goals. Thus, vital to the school's success are a culture of collaboration that promote conditions for student engagement, achievement, and growth (Policastro, 2018).

Definition of Terms

Active implementation frameworks (AIFs): Fixsen et al.'s (2005) AIFs were developed and organized using five overarching frameworks: (a) the What: Effective

interventions (innovations), (b) the Who: Invest in people, (c) the When: Implementation takes time, (d) "the How: Implementation drivers," (p. 13) and (e) "the How: Improvement cycles" (Duda & Wilson, 2015, p. 15).

Adherence to an intervention: A FOI element that pertains to the intervention or program service being delivered as it was written or designed (Mihalic, 2004).

Balanced literacy (BL): BL is described as "a philosophical orientation that focuses on reading and writing achievement that are developed through instruction and support in many environments, where teachers use different approaches that vary by teacher support and child control levels" (Frey et al., 2005, p. 272). Thus, BL "seeks to combine or balance skill-based and meaning-based instruction to ensure positive reading and writing results in children" (Bingham & Hall-Kenyon, 2013, p. 15). The five main BL reading components include shared reading, interactive read aloud, independent daily reading, small group instruction or guided reading, and word study (Learning A-Z, 2018; Policastro, 2018; WOBOE, 2016). The four main BL writing components include shared/interactive writing, modeled writing, guided writing, and independent writing (Learning A-Z, 2018; Policastro, 2018; WOBOE, 2016).

Capacity building: Capacity building is defined as "a process to increase the individual and collective abilities of professional staff to continuously improve student learning" (Clark, 2017, p. 5).

Educators: In this study, educators are defined as elementary ELA teachers and support staff personnel.

Effective implementation methods: A variable in the formula for success, which refer to the *Who*, *When*, and *How* (Duda & Wilson, 2015).

Effective interventions: A variable in the formula for success and referred to as the What, which relates to the system intervention that will affect literacy, is based on rigorous research, and has documented evidence of success in school settings (Duda & Wilson, 2015, p. 6).

Enabling contexts: A formula for success framework variable and focusing on the Who, When, and How's of the AIFs will only result in positive change when it occurs within an enabling context; thus, the school, district, or state must create a supportive context to achieve the intended outcome (Duda & Wilson, 2015).

Exposure or dose: A FOI element that pertains to the intervention quantity that the participants received such as the number of sessions implemented, session length, and how frequent program techniques were implemented (Carroll et al., 2007; Dusenbury et al., 2003; Mihalic, 2004).

Facilitation strategies: Carroll et al. (2007) introduced facilitation strategies as an additional FOI element and the authors found that researchers (e.g., Elliott & Mihalic, 2004; Forgatch et al., 2005; Hermens et al., 2001; McGrew & Griss, 2005) who focused on evaluating the FOI of certain interventions that put in place strategies such as guidelines, provision of manuals, monitoring and feedback, training, incentives, and capacity building, to optimize the level of fidelity achieved, suggested the possible role of facilitation strategies.

Fidelity: The level or degree to which an intervention, program, or practice is provided to students as intended (McKenna et al., 2014, p. 15).

Fidelity of implementation (FOI): FOI or implementation fidelity is also known as *integrity* or *adherence* (Carroll et al., 2007; Dane & Schneider, 1998; Dusenbury et al., 2003; Mihalic, 2004). Carroll et al. (2007) defined FOI as "the degree to which an intervention or program is delivered as intended" (p. 40).

Formula for success framework: Duda and Wilson's (2015) formula for success framework pertains to "effective interventions, effective implementation methods, and enabling contexts" (p. 8), which are all important elements. Educational leaders should focus the components that influence the selection and adoption of effective interventions, the local use of effective implementation methods to appropriately implement the interventions, and the contexts within which the interventions will be applied (Duda & Wilson, 2015).

Guided writing: A BL writing component, where "students create and write in small groups while the teacher guides the process" (Teach For America, 2011, p. 133).

Independent daily reading: A BL reading component that is done independently as students read text, which may be "self-selected or teacher recommended, at their independent reading level to practice reading strategies, and develop fluency" (New Hope-Solebury School District [NHSD], 2018, p. 1) and automatic word recognition (Frey et al., 2005; WOBOE, 2016).

Independent writing: A BL writing component, which pertains to students reading a text or book to themselves without the teacher's instruction or support and creating and

writing while the teacher monitors their progress and intervenes when it is appropriate (Frey et al., 2005; Teach For America, 2011).

Intended outcomes: What the school or district strives to achieve, such as increasing student achievement (Duda & Wilson, 2015; Moon & Park, 2016).

Interactive read aloud: A BL reading component and includes whole or small group instruction, where teachers read the text or book to students, and they are the only ones with copy of the text (Frey et al., 2005; Policastro, 2018).

Intervention complexity: Carroll et al. (2007) introduced intervention complexity as an additional FOI element and the authors revealed that a methodical review of the literature (e.g., Greenhalgh et al., 2004) that focuses on the intricacy of an idea posed a significant challenge to its adoption.

Modeled writing: A BL writing component that is the most popular teacher-directed approach as the teacher writes and creates text in front of students, controlling the pen, and constantly thinks out load about writing skills and strategies (WOBOE, 2016).

Participant responsiveness: A FOI element that pertains to how much participants are involved and engaged in program activities and content (Dusenbury et al., 2003).

Program differentiation: A FOI element that pertains to "identifying unique features of different components or programs so that these components or programs can be reliably differentiated from one another" (Dusenbury et al., 2003, p. 244).

Quality of delivery: A FOI element that pertains to how teachers, volunteers, or staff members deliver a program such as being skilled in using the methods and

techniques suggested by the program, as well as preparedness, attitude, and enthusiasm (Mihalic, 2004).

Shared/interactive writing: A BL writing component, which pertains to teachers modeling thinking aloud as they write so that students can see how good writer's thought process works (WOBOE, 2016).

Shared reading: A BL reading component and includes whole or small group instruction (Policastro, 2018). In addition, shared reading includes interactive reading where students join in or share the reading of a big book or other enlarged text while the teacher guides and supports them (Frey et al., 2005; NHSD, 2018; WOBOE, 2016).

Small group instruction or guided reading: This BL component includes guided reading, partner reading, skills groups, book clubs, and conferences (WOBOE, 2016). The teacher places students who have the same reading level together so that they can read books at their instructional level (NHSD, 2018; Pinnell & Fountas, 2010; WOBOE, 2016).

Word study: A BL reading component that refers to the study of the alphabetic symbol system (NHSD, 2018). It includes phonics in relation to letter and sound relationship, grammar, mechanics, spelling, vocabulary, morphemic analysis in relation to the use of "word parts to denote meaning, and automaticity for sight words" (NHSD, 2018, p. 1; WOBOE, 2016).

Significance of the Study

Findings from intervention studies add further knowledge to the literature on what advance best practices and works by helping students learn (Boardman et al., 2016;

Crawford et al., 2012). Therefore, this project added to the literature by filling a gap in the education literature with respect to the FOI of a BL program in a school district's elementary ELA classrooms and determined in what ways the delivery of instruction replicated the original instructional design based on perceptions of elementary teachers and support staff personnel. The results of this study could be used by academic leaders, school officials, support staff personnel, teachers, literacy facilitators, PD coaches, and other stakeholders to determine if the BL program is being implemented as designed in the school district and if further PD for ELA teachers is needed or any other action to support the implementation of the program as designed. Thus, findings may be used to further support students' literacy learning skills and improve their academic success.

Upon completion of this study, I will provide district leaders and participants an executive summary and a white paper or potential PD materials that may be used to support the identified needs perceived by the participants. Therefore, the implications for positive social change stemming from this study at the local level is that there is a concrete benefit to the district leadership as the product provided may facilitate any needed changes or may prompt further study of BL implementation by district staff. Thus, findings will inform district stakeholders of the status of the BL program implementation as designed. Evaluating program integrity provides stakeholders, such as administrators, evaluators, funders, teachers, and program staff with important information (Duerden & Witt, 2012; Rossi et al., 2004). "Program outcome and implementation data allow educators to understand what happened during program implementation and the resulting effects or outcomes" (Duerden & Witt, 2012, p. 6). In

turn, Duerden and Witt (2012) reported that this knowledge increases educators understanding so they can improve future services, know their current program offerings, and better serve those that they are working to help.

Research Questions

To explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design, I addressed the following research questions in this basic qualitative research study:

RQ1: What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?

RQ2: What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?

Review of the Literature

The purpose of this qualitative basic qualitative research study was to explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Elementary ELA teachers and support staff personnel are defined as educators; therefore, they are one population. By the end of third grade, approximately 67% "of children nationwide and

more than 80% of those from low-income families, are not proficient readers" (Smith, 2018, para. 1). Smith (2018) emphasized the significant and long-term consequences when children underachieve, for the children, the communities, and the nation, and if not properly addressed, will undermine efforts to put a stop to "intergenerational poverty, close the achievement gap, and reduce high school dropout rates" (para. 1). In addition, Smith discussed the effects that underachieving in reading can have on the next generation, such as being unprepared to thrive in a global market, join civilian and military service, and take part in higher education.

In 2017, the average reading score of fourth grade students in North Carolina public schools was 224, which was higher than 21 states, lower than seven states, and not significantly different from 23 states (Nation's Report Card, 2017). Caucasian students made up 48% of the student population, with an average reading score of 235, with 80% at or above the basic level, 52% at or above the proficiency level, and 15% at the advanced level (Nation's Report Card, 2017). African American students made up 25% of the student population, with an average reading score of 211, with 56% at or above the basic level, 22% at or above the proficiency level, and 3% at the advanced level (Nation's Report Card, 2017). Hispanic students made up 18% of the student population, with an average reading score of 211, with 57% at or above the basic level, 22% at or above the proficiency level, and 4% at the advanced level (Nation's Report Card, 2017). Asian students made up 3% of the student population, with an average reading score of 240, with 82% at or above the basic level, 54% at or above the proficiency level, and 22% at the advanced level (Nation's Report Card, 2017). Native American/Alaska Native

students made up 1% of the student population, but The Nation's Report Card (2017) did not provide any additional data on these students or Native Hawaiian/Pacific Islanders due to reporting standards not being met. Students of two or more races made up 4% of the student population, with an average reading score of 228, with 75% at or above the basic level, 41% at or above the proficiency level, and 11% at the advanced level (Nation's Report Card, 2017).

With improvement needed in North Carolina students' reading proficiency, district leaders incorporated the BL approach, which is part of the NCDPI literacy framework, and geared towards improving elementary school students' literacy achievement (Public Schools of Robeson County, 2018). The BL framework is characterized as a compromise or middle ground between theoretical approaches that concentrates on reading instruction, where focus is placed on teaching construction of meaning and word recognition (Lombardi & Behrman, 2016; Pressley et al., 2002; Rasinski & Padak, 2004). Therefore, in BL classrooms, teachers balance time towards "skill-based activities such as phonemic awareness, alphabetic principle, and phonics with literature-based activities such as drawing inference, predicting, writing about text, and discussing" (Lombardi & Behrman, 2016, p. 66). In this study, I explored ELA teachers' and support staff personnel's perceptions of the fidelity of implementing the BL model in the ELA classrooms in relation to the original intended design in the target school district ELA classrooms in North Carolina. In this section, I include a literature search strategy, conceptual framework, a review of the broader problem, implications, and a summary.

Literature Search Strategy

I performed detail searches in the research databases at Walden University Library, which included EBSCOhost databases, Teacher Reference Center, ERIC, Academic Search Complete, Education Source, PsycINFO, ProQuest Dissertations and Theses Global, and Thoreau Multi-Database Search. Additionally, I used Google Scholar to find scholarly literature. Search terms included *fidelity and balanced literacy*, *fidelity and academic success*, *fidelity and program implementation and language arts*, *balanced literacy*, *balanced literacy component*, *balanced literacy and language arts*, *balanced literacy and shared reading*, *balanced literacy and implementation*, *balanced literacy and professional development*, *formula for success framework*, and *active implementation frameworks*. I placed emphasis on finding current scholarly research articles within the last 5 years.

Conceptual Framework

Carroll et al.'s (2007) implementation fidelity conceptual framework and Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs served as the conceptual frameworks of this basic qualitative research study. In this basic qualitative research study, Carroll et al.'s framework is referred to as Carroll et al.'s FOI conceptual framework. I discuss the connections among key elements of each framework and how the frameworks have been applied previously in ways like this study. I organized this subsection in the following areas: (a) fidelity of implementation conceptual framework, (b) research application of fidelity of implementation conceptual framework, (c) formula for success framework linked with the active implementation

frameworks, and (d) research application of formula for success framework linked with the active implementation frameworks.

Fidelity of Implementation Conceptual Framework

FOI or implementation fidelity is also known as *integrity* or *adherence* (Carroll et al., 2007; Dane & Schneider, 1998; Dusenbury et al., 2003; Mihalic, 2004). Carroll et al. (2007) defined FOI as "the degree to which an intervention or program is delivered as intended" (p. 40). Carroll et al. discussed FOI as a possible "moderator of the relationship between interventions and their intended outcomes" (p. 40), thus, affecting how much an intervention affects outcomes. As a result, Carroll et al. argued that FOI needs to be measured because by appropriately evaluating fidelity, a practical assessment can be made of how it contributes to outcome or affects performance. Carroll et al. therefore claimed that evaluation is needed to determine whether the absence of effect is a result of weak implementation or program inadequacies.

Researchers should determine the FOI for interventions and their outcomes to understand the actual effect of interventions and prevent possible misleading conclusions from being made about their effectiveness (Carroll et al., 2007). In doing this, Carroll et al. (2007) related that primary researchers can have confidence in crediting outcomes to the intervention and secondary researchers are more confident in their synthesis of studies. Carroll et al. pointed out the need for a conceptual framework that could be used to measure and understand FOI's process and concept. Carroll et al. conducted a critical review on FOI, mostly primary literature, and proposed a new FOI conceptual framework for evaluating and understanding FOI. z

Adherence to an intervention is the first element and pertains to the intervention or program service being delivered as it was written or designed (Mihalic, 2004). According to Mihalic (2004), adherence includes (a) delivering all essential components to the correct population; (b) appropriately training staff; (c) using the correct materials, protocols, and techniques; and (d) carrying out the program service or intervention in the prescribed locations or contexts. Exposure or dose is the second element and pertains to the intervention quantity that the participants received such as the number of sessions implemented, session length, and how frequent program techniques were implemented (Carroll et al., 2007; Dusenbury et al., 2003; Mihalic, 2004). Carroll et al. (2007) included *coverage* in the exposure and dose element, which refers to assessing if individuals actually receive the benefits they are supposed to when they participate in or receive help of an intervention.

The third element, quality of delivery, pertains to how teachers, volunteers, or staff members deliver a program such as being skilled in using the methods and techniques suggested by the program, as well as preparedness, attitude, and enthusiasm (Mihalic, 2004). Quality of delivery may be ambiguous as this element might involve the use of a benchmark beyond or within that specified by the designer of the intervention, such as employing program techniques (Carroll et al., 2007) or "the extent to which a provider approaches a theoretical ideal in terms of delivering program content" (Dusenbury et al., 2003, p. 244). Carroll et al. (2007) reported that when there is a clear benchmark, quality of delivery as well as adherence and exposure or dose may be treated as discrete aspects that are needed to assess the intervention's fidelity.

Participant responsiveness is the fourth element and pertains to how much participants are involved and engaged in program activities and content (Dusenbury et al., 2003). Carroll et al. (2007) noted that this element involves participants' judgments about intervention outcomes and relevance. Program differentiation is the fifth element and pertains to "identifying unique features of different components or programs so that these components or programs can be reliably differentiated from one another" (Dusenbury et al., 2003, p. 244). Carroll et al. explained that although program differentiation is an element of FOI, this element really does not measure fidelity but instead determines which elements are important for its success, which is important to evaluating new interventions. Carroll et al. also noted that program differentiation helps in discovering elements that affect outcomes and assessing whether certain elements are unnecessary. Important elements may be found by surveying the intervention designers or using component analysis where the intervention outcome effects are assessed and the component that has the most impact is determined (Carroll et al., 2007; Hermens et al., 2001). Carroll et al. related that the program differentiation should be described as the "identification of an invention's essential components" (p. 43). The researchers claimed that if the important components are the most challenging to implement, then it may help in understanding the unsuccessful intervention.

Although the FOI involves measurement of the five elements, Carroll et al. (2007) reported that there are two distinct views among researchers about how this should be done. In relation to the first view, Carroll et al. noted that researchers (e.g., Mihalic, 2004; Mihalic et al., 2002) argued that each of the five elements represent a different way

to measure fidelity; thus, FOI can be measured using either "adherence to an intervention, exposure or dose, quality of delivery, participant responsiveness, or program differentiation" (p. 42). In relation to the second view, Carroll et al. shared that researchers (e.g., Dane & Schneider, 1998; Dusenbury et al., 2003) argued that all five elements should be evaluated to get a full understanding of the process. However, Carroll et al. explained that the relationship between different elements is more complex; thus, the researchers suggested a third FOI conceptual framework that includes the measurement of all five elements, where the function of each element is clarified and explained as well as their relationship to each other. In addition, Carroll et al. introduced two additional elements into their framework, which resulted in a combined total of seven elements. The researchers noted that the two new elements are: (a) intervention complexity, and (b) facilitation strategies. Regarding intervention complexity, Carroll et al. revealed that a review of the literature (e.g., Greenhalgh et al., 2004) that focused on the intricacies of an idea posed a significant obstacle to its adoption. About facilitation strategies, Carroll et al. found that researchers (e.g., Elliott & Mihalic, 2004; Forgatch et al., 2005; Hermens et al., 2001; McGrew & Griss, 2005;) who focused on evaluating the FOI of certain interventions that created strategies such as provision of guidelines, manuals, monitoring and feedback, training, incentives, and capacity building, to optimize the level of fidelity achieved, suggested the possible role of facilitation strategies. Based on Carroll et al. conceptual framework, Table 6 shows the lists of elements to evaluate FOI and the relationship between them are shown in Figure 1.

Table 6

Elements of Fidelity of Implementation

Elements
Adherence
Content
Coverage
Frequency
Duration
Moderators
Intervention complexity
Facilitation strategies
Quality of delivery
Participant responsiveness
Identification of essential components

Note. Adapted from "A Conceptual Framework for Implementation Fidelity," by C.

Carroll, M. Patterson, S. Wood, A. Booth, J. Rick, and S. Balain, 2007, *Implementation*

Science, *2*, p. 43 (https://doi.org/10.1186/1748-5908-2-40).

Figure 1

Common Framework for Fidelity of Implementation
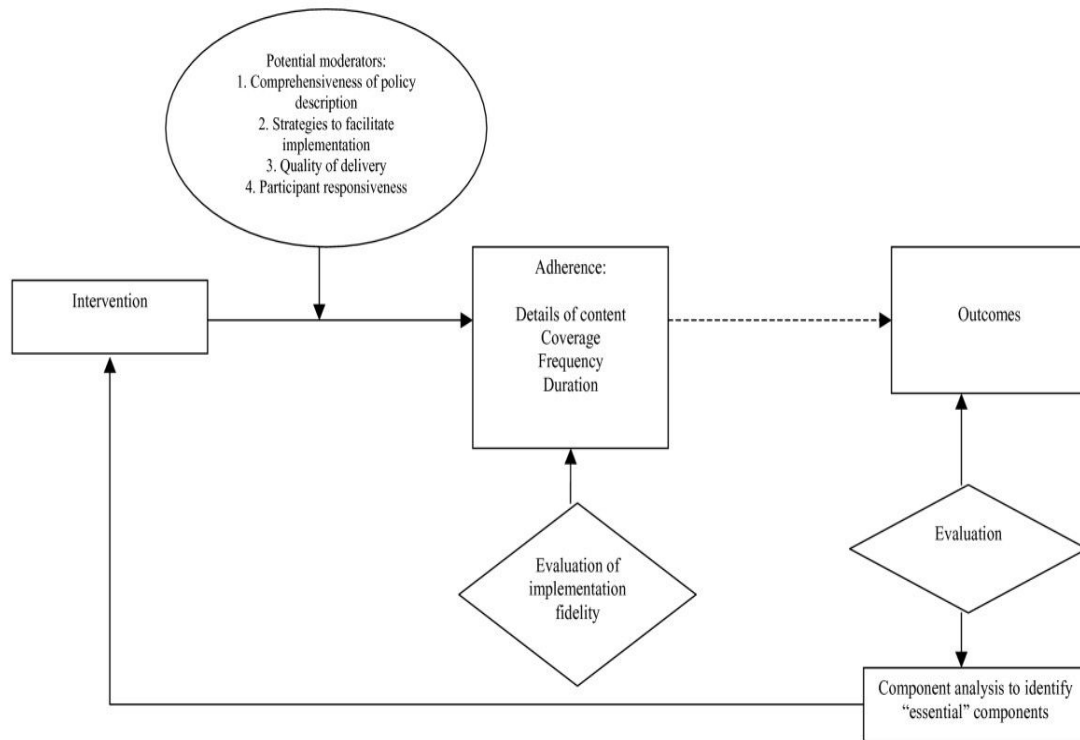
Note. Reprinted from "A Conceptual Framework for Implementation Fidelity," by C.

Carroll, M. Patterson, S. Wood, A. Booth, J. Rick, and S. Balain, 2007, *Implementation*

Science, 2, p. 43 (https://doi.org/10.1186/1748-5908-2-40).

Figure 1 displays Carroll et al.'s (2007) conceptual framework, which depicts the important elements of FOI and their relation to each other. Carroll et al. reported that measurement of FOI "is the measurement of adherence, i.e., how far those responsible for delivering an intervention actually adhere to the intervention as it is outlined by its designers" (p. 42). The researchers noted that adherence includes the following areas: "(a) content, (b) frequency, (c) duration, and (d) coverage (exposure or dose)" (Carroll et al., 2017, p. 42). Carroll et al. explained that "the degree to which the intended content or frequency of an intervention is implemented is the degree of implementation fidelity achieved for that intervention" (p. 43). The researchers noted that the level achieved may be moderation, influenced, or affected by other variables, which are as follows: "(a) intervention complexity, (b) facilitation strategies, (c) quality of delivery, and (d) participant responsiveness" (Carroll et al., 2017, p. 42). The researchers related that if participants are not keen about an intervention, then the intervention is not as likely to be implemented properly and completely. Carroll et al. explained that the broken lines in Figure 1 indicate that "the relationship between an intervention and its outcomes is external to" (p. 44) FOI, but that the amount of FOI achieved can have an impact on this relationship. Lastly, Carroll et al. related that outcome analysis may pinpoint components that are vital to the intervention, which should "be implemented if the intervention is to have its intended effects" (p. 44). As a result, this evaluation may steer the intervention content by establishing the lowest requirements for high FOI, hence, the implementation of the important components of the intervention.

The function of the FOI elements in Table 6 and Figure 1 are discussed in further detail. Carroll et al. (2007) shared that adherence is the outcome measure of FOI. The researchers noted that fidelity is high if an intervention that has been implemented fully follows the content, duration, frequency, and coverage described by those who designed it. Thus, Carroll et al. shared that measuring FOI pertains to evaluating if the implementation process result is effective based on the intervention as planned by those who designed it. The researchers discussed the areas of adherence, which include the duration, frequency, and coverage of the intervention being delivered, thus, the dose or exposure.

A high level of FOI or adherence, or its important components, is not easily achieved as numerous factors may moderate or influence the level of fidelity with which the program or intervention is implemented (Carroll et al., 2007). Carroll et al. (2007) discussed the following moderators in further detail: "(a) intervention complexity, (b) facilitation strategies, (c) quality of delivery, and (d) participant responsiveness" (p. 42). In regard to intervention complexity, Carroll et al. reported that the intervention description may be simple, complex, detail, or vague. Interventions that are detailed, specific, and simple tend to be executed with high fidelity compared to ones that are overly complex or vague. In addition, simple interventions are easier to achieve than ones that are multifaceted due to less response barriers for simple models (Carroll et al., 2007; Dusenbury et al., 2003; Greenhalgh et al., 2004). Hence, Carroll et al. noted that intervention's comprehensiveness and description has an effect on how much the program successfully follows its specified details when carried out.

Facilitation or support strategies, which include training, guidelines, manuals, and monitoring and feedback can be used to improve and regulate FOI by ensuring that all personnel are receiving similar support and training as the objective is that the intervention delivery is as similar as possible (Bellg et al., 2004; Carroll et al., 2007). Carroll et al. (2007) discussed the possibility of these strategies moderating the fidelity degree achieved; thus, by doing more to assist implementation through training, feedback, and monitoring, the greater the FOI level achieved. When it comes to multifaceted interventions, which may be complex and vulnerable to variations in their implementation, it is important that to use strategies in enhancing fidelity and regulating what is being implemented (Medical Research Council, 2000).

Quality of delivery has to do with if intervention is carried out in an appropriate way to attaining what was intended and is a possible relationship moderator between an intervention or program and the fidelity or reliability with which the intervention is implemented (Carroll et al., 2007). Carroll et al. (2007) noted that if the intervention content is delivered poorly, then it would likely affect full implementation. Carroll et al. noted that regarding participant responsiveness, if participants believe that an intervention is not relevant to them, then they may become nonengaged, which may be a central reason of its failure or low coverage, hence, FOI may be low (Carroll et al., 2007).

The moderators in Table 6 and Figure 1 are not discrete elements because of the possible relationship between multiple moderators (Carroll et al., 2007). For example, Carroll et al. (2007) explained that "the provision or guidelines on how to deliver an intervention may have a direct impact on the quality with which an intervention is

actually delivered" (p. 46), which may then affect the "fidelity with which an intervention is implemented" (p. 46). Carroll et al. highlighted that if there is not much training, then poor quality may be the result. The researchers noted that participants' responsiveness may also be influenced by facilitation strategies. Carroll et al. related that giving incentives could make the providers and participants more receptive and open to a new intervention. The researchers indicated that quality of delivery functions similarly because an intervention that is well delivered may result in participants being more committed and enthusiastic to it, thus, each moderator is predictive of another moderator. Carroll et al. argued that an implication for their FOI conceptual framework is that the evaluation has to measure all the factors that affect the FOI degree, such as the sufficiency of facilitation strategies and the complexity of the intervention. The researchers also noted that the evaluation must also assess participant receptiveness or responsiveness to suggested and implemented interventions. Carroll et al. emphasized the need to identify and control for the influence of potential obstacles to implementation so that problems can be attended to, and greater implementation is attained.

Research Application of Fidelity of Implementation Conceptual Framework

Strong FOI is related to improved curricula outcomes and programs conducted in natural settings such as community centers or schools (Cornish et al., 2016). There are barriers to FOI in the natural setting that may result in adaptations to curricula that are unintentional and reactionary (Bumbarger & Perkins, 2008; Cornish et al., 2016; Kelsey & Layzer, 2014). Cornish et al. (2016) discussed FOI five elements: "(a) adherence to an intervention, (b) exposure or dose, (c) quality of delivery, (d) participant responsiveness,

and (e) program differentiation" (p. 139). Cornish et al. reported that researchers such as

Carroll et al. (2007) discuss fidelity in terms of maintaining or improving positive

program results, but Cornish et al. also noted the importance of PD, problem solving, and

feedback loop in the mentoring process. Cornish et al. related that the use of fidelity

monitoring as a process evaluation tactic may help organizations achieve high

implementation fidelity levels and enhance program outcomes.

     Educators or service providers tend to use self-report fidelity checklist or logs to

measure FOI (Cornish et al., 2016). Using online data systems to track fidelity is noted to

be a better practice than using paper-based instruments (Cornish et al., 2016; Kershner et

al., 2014). Cornish et al. (2016) took part in a greater evaluation of a grant program that

included multiple counties located "in the Midwest that supports the implementation of

comprehensive, evidence-based strategies for adolescent pregnancy prevention" (p. 139).

The pilot study included 49 counties and five different curricula. Participants were health

educators who were putting the curricula into practice and reporting on fidelity measures.

Each fidelity log included data entry forms that were online and a paper workbook.

     Findings indicated that it is feasible to simultaneously monitor fidelity of

numerous curricula while staying open and adapting to different program components

(Cornish et al., 2016). Cornish et al. (2016) also found high fidelity in all measured

elements or dimensions. Findings indicated that exposure was the most challenging

across curricula due to elements such as time constraints and school preferences. For

example, Cornish et al. noted unavoidable modifications such as the curriculum requiring

60-minute lesson plans, but the classes were only 50 minutes. Findings also indicated that

the adherence element or dimension presented challenges to some educators, such as educators being uncomfortable with some lesson plan components and then having to make modifications to fit their comfort level, perceived student needs, and school guidelines. Conversely, findings indicated that the quality of delivery element or dimension was high for all five curricula. Cornish et al. attributed high quality of delivery to possible social desirability where educators want to be perceived positively because there was a disconnect between high self-confidence and "self-reported low comfort with lesson components" (146). In addition, findings indicated that in relation to implementation fidelity scoring and evaluation, contextual factors influenced the five fidelity elements or dimensions.

Conclusions from the study included that the manner in which fidelity was monitored being easy to carry out and well-received as well as the need for a more efficient data submission and organization process, including mobile technology for teachers to immediately input fidelity data and restructuring the process further due to educators' busy schedule (Cornish et al., 2016). In addition, Cornish et al. (2016) discussed the significance of communication between and among the evaluator, grant administration, and grantees or educators as the open feedback loop resulted in inclusion where questions and input were embraced. The researchers noted that improved PD for educators enhances implementation fidelity; thus, the results of the study would be used to guide new educator training activities, such as getting over implementation problems while sustaining high fidelity. Cornish et al. also discussed the importance of curricula being flexible and responsive to K though 12 school system's changing demands and

schedules. Cornish et al. recommended future research on the sustainability of fidelity monitoring.

Children who are diagnosed with behavioral health disorders often show extremely low levels of moderate to vigorous physical activity (MVPA), which may be attributed to substantial obstacles to MVPA engagement (Bowling et al., 2016; Emck et al., 2009; Mangerud et al., 2014; Rimmer et al., 2007). Between 2013 and 2015, Bowling et al. (2016) designed, implemented, and evaluated *Manville Moves*, an exercise program "for children with behavioral health disorders within a therapeutic school setting" (p. 82) in Boston, Massachusetts. The researchers used Carroll et al. (2007) FOI conceptual framework for assessing implementation fidelity. Bowling et al. used a 14-week mixed methods approach to assess five implementation fidelity elements, including adherence, program exposure, program differentiation, quality of delivery, and student responsiveness.

Random assignment by classroom was used and students received the 7-week program during the fall or spring (Bowling et al., 2016). Bowling et al. (2016) used data captured by the bicycles; student surveys of their health behaviors and self-ratings of athletic self-efficacy and exercise enjoyment; staff interviews that focused on perceived barriers to intervention implementation, suitability of the exercise method, and recommendations for intervention changes or improvement; and student conversations pertaining to their views and use of the bicycles, in addition to the Manville Moves program. Findings indicated that Manville Moves was carried out with high fidelity, with approximately 90% of sessions carried out as planned, students overall met the goal

riding intensity and time every week, staff shared low burden levels, and there were low student refusals. In addition, Bowling et al. found that the majority of students showed high engagement levels, where critical program engagement components included prizes, awards, and video gaming. The researchers also discussed lessons from the study that could help future program implementations. Bowling emphasized that the information from the assessment was important in evaluating the level that the program was successfully implemented, which affects the program's overall efficacy as well as dissemination and sustainability potential.

Formula for Success Framework Linked With the Active Implementation Frameworks

Duda and Wilson's (2015) formula for success framework was also applicable to examining elementary teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Effective interventions alone will not solve the challenges faced by school and district leaders, teachers, and staff members (Duda & Wilson, 2015; Fixsen et al., 2010). Thus, to successfully affect student outcomes, educational policymakers should attend to and build strategies that support Duda and Wilson's formula for success, which is depicted in Figure 2. Permission was obtained to use, adapt, and reprint the formula for success (see Appendix B).

Figure 2

Formula for Success

Note. Adapted from "Using Implementation Science to Close the Policy to Practice Gap,"
by M. A. Duda, and B. A. Wilson, 2015, *A Literate Nation White Paper*, p. 3
(https://test.wilsonlanguage.com/wp-
content/uploads/2016/06/Implementation_Science_White_Paper_for_Literate_Nation.pdf
).

"Effective interventions, effective implementation methods, and enabling
contexts" (p. 8) are all important elements and educational leaders should pay attention to
the factors that influence the selection and adoption of effective interventions, the local
use of effective implementation methods to appropriately implement the interventions,
and the contexts within which the interventions will be applied (Duda & Wilson, 2015).
Duda and Wilson's (2015) formula for success framework has been linked with Fixsen et
al.'s, (2005) AIFs, which was developed and organized using five overarching
frameworks: (a) the What: Effective interventions (innovations), (b) the Who: Invest in
people, (c) the When: Implementation takes time, (d) "the How: Implementation drivers"

(p. 13), and (e) "the How: Improvement cycles" (Duda & Wilson, 2015, p. 15). Figure 3

shows the AIFs and Figure 4 displays the linking between formula for success with the

AIFs. Permission was obtained to use, adapt, and reprint both the AIFs and the linking

between formula for success with the AIFs (see Appendices B and C).

Figure 3

Active Implementation Frameworks
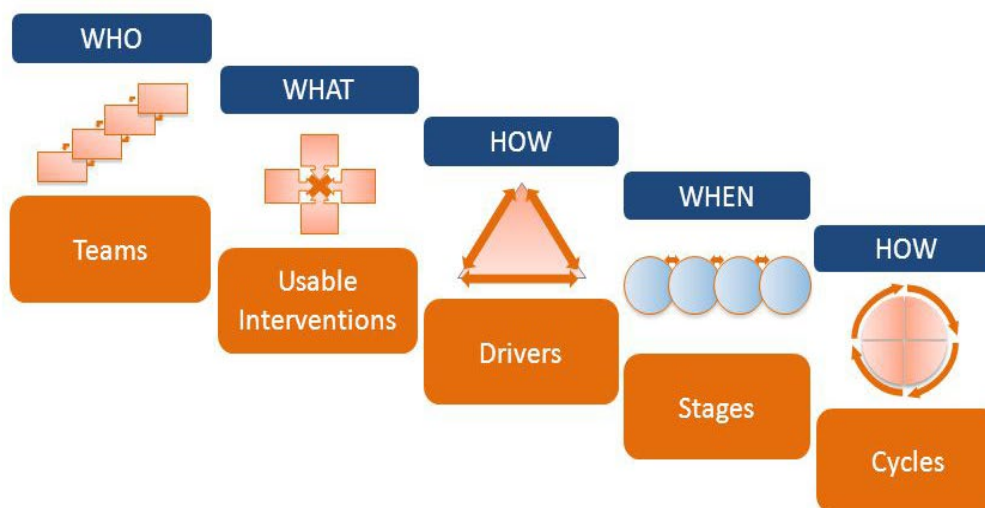
Note. Adapted from "Module 1: An Overview of Active Implementation Frameworks,"

by National Implementation Research Network, University of North Carolina at Chapel

Hill, 2017 (http://implementation.fpg.unc.edu/module-1).

Figure 4

Linking the Formula for Success With the Active Implementation Frameworks
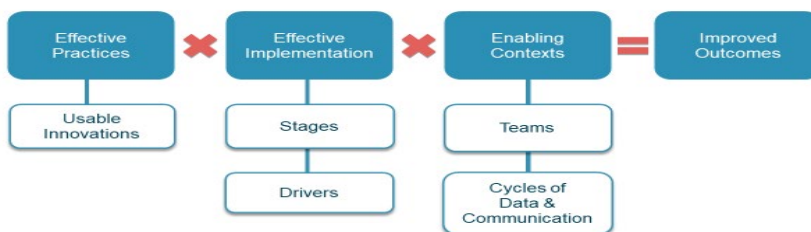
Note. Adapted from "Make "it" Happen: Using Implementation Science with Wilson Programs," by M. A. Duda, A. Penfold, L. Wernikoff, and B. Wilson, 2014 (https://www.wilsonlanguage.com/PDF/WIN%20Make%20it%20Happen.pdf).

The first variable, the *What*, increases and maintains positive student outcomes (Duda & Wilson, 2015). Duda and Wilson (2015, p. 4) reported that for this variable, the following question is asked, "What is the usable intervention (in this context, the system intervention/innovation) being implemented?" Effective interventions are referred to as the What, which relates to the system intervention that will affect literacy, is based on rigorous research, and has documented evidence of success in school settings (Duda & Wilson, 2015, p. 6). Duda and Wilson related that for educational policymakers, this could be a new policy, mandate, or system-change initiative, which are collectively called innovations. The authors noted that the innovation may affect local decisions about programs, practices, and other local initiatives.

After the interventions, programs, or practices are selected or adopted, the next important step is building local implementation competence to take part in and maintain the work (Duda & Wilson, 2015). Duda and Wilson (2015) explained that effective implementation methods refer to "the *Who*, *When*, and *How*" (p. 8). Duda and Wilson explained that the Who refers to investing in people and when creating an effective implementation system, it is important to identify who will have the time and ability to engage in system transformation. Duda and Wilson (2015) reported that for this variable, the following question is asked, "Who is accountable for ensuring that it is being delivered as intended?" (p. 4). The authors discussed the importance of having the right people on implementation teams, which are action-oriented groups that work together based on a shared goal and purpose. This includes creating clear, effective, and associated system that promotes the use of effective and important practices or programs (Duda & Wilson, 2015). Duda and Wilson noted that the individuals on implementation teams "should have the skills, knowledge, commitment, and authority to make and enforce decisions" (p. 8). The authors explained that implementation teams' main role is to make sure that all components of the innovation can be used as intended and produce the intended student outcomes. The authors related that these individuals may have to think of ways to adjust the system in a manner that will improve the adoption of the innovation, such as focusing on current strengths and building implementation capacity in weaker areas.

The implementation team includes approximately three to five members whose job description includes addressing the system changes that are needed to back the new

practice or program as well as having the skills and knowledge to implement the program

or practice (Duda & Wilson, 2015). Duda and Wilson (2015) discussed the importance of

implementation teams building on current strengths within the system such as having

effective coaches, coaching support, and data collection system that is accessible as this

is important at the beginning of a new initiative, applying a new policy or mandate, and

throughout the process. The authors explained that implementation teams at the local

level tend to include school members, district leadership team, as well as other staff

members who are authorized to make decisions. Duda and Wilson related that the team

needs to focus on the alignment of all system components to ensure that the practices and

program are carried out with fidelity so that all students involved fully benefit. The

authors noted that linking implementation teams across the education system, such as

school with district, district with regional, and regional with state, can help to close the

policy and practice gap. Thus, implementation teams should function and share

information in a linked manner, which is displayed in Figure 5. Permission was obtained

to use, adapt, and reprint linked implementation teams (see Appendix B).

Figure 5

Linked Implementation Teams
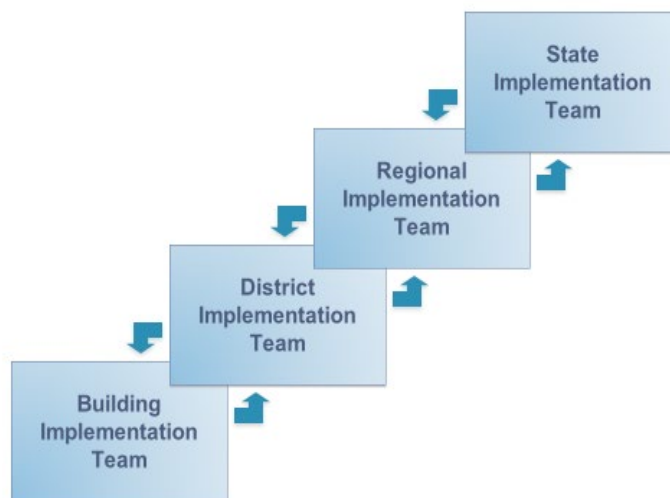
Note. Adapted from "Using Implementation Science to Close the Policy to Practice Gap,"

by M. A. Duda and B. A. Wilson, 2015, *A Literate Nation White Paper*, p. 10

(https://test.wilsonlanguage.com/wp-

content/uploads/2016/06/Implementation_Science_White_Paper_for_Literate_Nation.pdf

).

In relation to the When variable, it is essential to understand its implementation stage in the classroom, school, district, or region (Duda & Wilson, 2015). Duda and Wilson (2015) reported that for this variable, the following question is asked, "When is the organization ready to make the needed shifts until it is fully embedded and has become education as usual?" (p. 4). The authors noted that many initiatives are going on at the same time and each initiative is normally "at a different stage of adoption, use, accuracy or fidelity, and ability to sustain" (Duda & Wilson, 2015, p. 10). When leaders and policymakers understand the current implementation stage of the targeted initiative, then they are better able to manage the rollout pace and identify and use formative data for decision-making purposes.

For change to take place at state, district, or classroom level, a plan is needed that helps staff members navigate through the implementation stages (Duda & Wilson, 2015). The plan should allow teachers and administration to be engaged and supported, thus, allowing them to make effective and full use of the latest interventions in their schools (Duda & Wilson, 2015). Duda and Wilson (2015) reported that by understanding the implementation stages, intentional planning for change takes place, which results in the following:

1. Alignment of activities to the applicable stage, increasing the likelihood of moving successfully through the stage and on to the next one.

2. Preparation for activities and challenges that will be encountered in the next stage.

3. Reduction in wasted time and resources.

4. Increased likelihood of sustained and improved use of educational practices.

(p. 11)

It takes approximately 2 to 4 years to make an evidence-based practice, educational innovation, or program fully and successfully operational (Duda & Wilson, 2015). Duda and Wilson (2015) discussed four stages that can lead to continued effectiveness and long-term sustainability of any intervention, which are as follows: "(a) exploration, (b) installation, (c) initial installation, and (d) full implementation" (p. 11). Duda and Wilson noted that these four stages are not linear, therefore, there is no clear beginning or end as organizations may move between stages due to changes in leadership, staff, or they may be unsuccessful at using the program with fidelity. These four stages are discussed in further detail as follows:

1. Exploration: Identification of the need for change, learning about possible interventions that may provide solutions, learning about what it takes to implement the intervention effectively, developing stakeholders and champions, assessing, and creating readiness for change, and deciding to proceed (or not).

2. Installation: Establishment of the resources needed to use an intervention and the resources required to implement it as intended.

3. Initial implementation: The first use of an intervention by teachers and others who have just learned how to use it and who are working in school and district environments that are just learning how to support the new ways of work.

4. Full implementation: The skillful use of an intervention that is well integrated into the repertoire of teachers, and routinely and effectively supported by successive building and district administrators. (Duda & Wilson, 2015, p. 11)

There are two How's: (a) the How: Implementation drivers and (b) the How: Improvement cycles (Duda & Wilson, 2015). Duda and Wilson (2015, p. 4) reported that for this variable, the following question is asked, "How do you create a system that will support and sustain these program and practices?" According to Duda and Wilson, the How: Implementation drivers refer to a set of three factors necessary for successful implementation: (a) staff "competency drivers, (b) organization drivers, and (c) leadership drivers" (p. 13). These three factors improve the chances of creating an effective and aligned system so that the intended outcome of a policy can be achieved. The three factors are intertwined and compensatory, therefore, they work together. Duda and Wilson discussed three categories of implementation drivers as follows:

1. Staff competency drivers: Support personnel in their use of a new program.

2. Organization drivers: Help align programs, policies, procedures, and opportunities to ensure that new interventions have the support and buy-in to be used as intended.

3. Leadership drivers: Acknowledge the importance of leaders and leadership styles and support current and future leaders in an organization. (p. 13)

The How: Improvement cycles variable pertains to leadership and improvement teams making numerous decisions when adopting new evidence-based practices (Duda & Wilson, 2015). Duda and Wilson (2015) related that learning and unlearning takes place,

which requires more than a short cycle of change. Therefore, the authors pointed out that the educational system at all levels has to create a process that allows for continuous improvement, which assist with the scaling up of a new policy with success.

The final variable in the formula for success is an enabling context (Duda & Wilson, 2015). Duda and Wilson (2015) reported that attending to the What, Who, When, and How's of the AIFs influences the intended outcomes predictability and achievability. These pertains to having the appropriate members on the implementation team, knowing, and acting accordingly based on where the district or school is with implementing the intervention program, being knowledgeable about the implementation drivers and being supportive in order to promote the outcome and being knowledgeable and taking part in improvement cycles (Duda & Wilson, 2015). These factors together include valuable implementation processes that will help the district or school attain its intended outcomes (Duda & Wilson, 2015). However, Duda and Wilson explained that based on the formula for success, focusing on all of these areas will only result in positive change when it occurs within an enabling context; thus, the school, district, or state must create a supportive context to achieve the intended outcome.

Research Application of Formula for Success Framework Linked With the Active Implementation Frameworks

The formula for success framework (Duda & Wilson, 2015) and the AIFs (Fixsen et al., 2005) are part of the implementation science frameworks, which provides understanding about effective implementation processes elements that lead to new programs, policies, or practices being adopted in the way that they were intended (Duda

& Wilson, 2015). Brown (2018) conducted a case study to examine teachers' and support staff personnel's perceptions of the FOI of Georgia response to intervention (RTI) framework at an elementary school and used the implementation of science framework as the conceptual framework. Findings indicated that teachers received training on program, but not on the intervention process; teachers and support staff personnel used data for input, but not on decision related to interventions; ongoing PD was needed continuously to help teachers understand and implement RTI model with fidelity; teachers struggled with expectations due to yearly changes in the RTI process; teachers and support staff personnel needed to ensure that instruction was provided to meet diverse learner needs; and teachers and support staff personnel needed to accept the RTI program.

Traditional approaches to sharing evidence-based innovations and programs for families and children depend on administrators, practitioners, and policymakers to make meaning of research, and this has been insufficient (Balas & Boren, 2000; Clancy, 2006; Metz et al., 2013; Mihalic et al., 2004). Metz et al. (2013) provided an overview of the AIFs and described a "case study of the Catawba County Child Wellbeing Project" (p. 9), where AIFs was used in children welfare to assist with the implementation of evidence-based and evidence-informed practices to increase the well-being of children leaving the homes they were placed into permanency. Metz et al. noted that the important aspects of the early successes found in Catawba County included "investing in the development of active implementation teams and cross-sector leaders" (p 15). Metz et al. reported that implementation teams took part in creating and installing implementation drivers to supply the infrastructure for transformation. In addition, Metz et al. also related that

implementation drivers' assessments provided important data for action planning, thus, strengthening the infrastructure and increased fidelity over time. Metz et al. recommended the use of focused, rigorous designs to further test the findings.

Literature Review of the Broader Problem

In this subsection, I provide a detail review of the broader problem associated with the local problem. In this subsection, I include the following areas: North Carolina State educational mandates; fidelity, program implementation, and success; historical context of the balanced literacy framework; components of balanced literacy; implementation of balanced literacy; balanced literacy, student success, and academic achievement; and balanced literacy and professional development.

North Carolina State Educational Mandates

The North Carolina Read to Achieve program is part of the North Carolina General Assembly's Excellent Public School's Act, which became effective in July 2012, and pertains to all North Carolina K through third grade students (Cobey et al., 2016; Pender, 2018). The program's goal is to make sure that all students become proficient readers or read at or above grade level by the end of third grade (Cobey et al., 2016; Pender, 2018). Students reading proficiently by the end of the third grade is considered the most critical indication about whether children will graduate high school (Otto, 2017; Smith, 2018). Otto (2017) explained the curriculum shifts to more advanced topics in fourth grade. Therefore, if children are still learning to read, reading to learn becomes more challenging (Otto, 2017). However, if children are reading proficiently by the end

of third grade, then they are four times more likely to graduate from high school than their classmates who struggle with reading (Hernandez, 2011; Otto, 2017).

At the end of their third year, students in North Carolina take the third grade EOG test (Cobey et al., 2016). Cobey et al. (2016) explained that if students are proficient, they are promoted to the fourth grade. However, the authors noted that if students are not proficient, they may still be promoted to the fourth grade due to a "good cause exemption" (Cobey et al., 2016, p. 5). Conversely, Cobey et al. noted that if students do not qualify for a "good cause exemption" (p. 5), then they may retake the EOG using a different form and may also take the Read to Achieve alternative assessment. If students are proficient on one of these assessments, then they are promoted to the fourth grade, but if they fail these assessments, then they are encouraged to attend reading camp (Cobey et al., 2016). Cobey et al. related that parents decide whether students attend reading camp and students who receive a good cause exception may attend at no cost to them. After students have completed the reading camp, Cobey et al. shared that they may obtain proficiency by passing one of three assessments, either the Read to Achieve alternative assessment, a completed student reading portfolio, or the local alternative assessment approved by the State Board of Education.

Students who did not attend the reading camp are provided with an opportunity to take the Read to Achieve alternative assessment or local alternative assessment on a day designated by a local education agency (LEA; Cobey et al., 2016). Cobey et al. (2016) noted that students are promoted to fourth grade if they are proficient on one of the assessments. Cobey et al. explained that if students are not proficient, they may be placed

in one of the following three situations: (a) retained in a third grade accelerated class where they are pulled out for 90-minute reading instruction with a teacher, (b) placed in a three quarter transitional class with a retained reading level where they are being taught fourth grade standards while their reading deficiencies are addressed, and (c) placed in a fourth grade accelerated class with a retained reading level where they are pulled out for intense 30-minute reading instruction with a teacher. Cobey et al. emphasized that the students' placement should be made based on a "comprehensive balanced assessment system that includes (a) formative, benchmark, and summative assessments" (p. 5); (b) observations; (c) historical data; (d) student grades; and (e) classroom and reading camp performance. In elementary schools in North Carolina, school leaders use the BL model for reading and writing, which is aligned with the NCDPI literacy framework (Jackson County Public Schools, 2018; Public Schools of Robeson County, 2018). The BL program is discussed in further detail in other literature review areas.

Fidelity, Program Implementation, and Success

It is important and necessary that educators evaluate the effect of their services and programs (Duerden & Witt, 2012; Rennekamp & Arnold, 2009). Duerden and Witt (2012) discussed implementation evaluations and reported that a lack of understanding of program integrity or the level at which a program was carried out as originally planned, can make it difficult to suggest connections between outcomes and programs. Therefore, by having a clear view of how sound a program was carried out allows educators to better connect programs to outcomes that have been observed (Dobson & Cook, 1980; Duerden & Witt, 2012; Quinn & Kim, 2017). In addition, implementation findings allow educators

to understand how their programs are being conducted and ways in which those programs can be improved (Duerden & Witt, 2012; Rossi et al., 2004). Duerden and Witt noted that combining implementation evaluations with outcome evaluations may help with finding effective practices and programs.

To assess program implementation, educators should obtain thorough knowledge of their programs and focus on the implementation system, program foundations, and program monitoring (Duerden & Witt, 2012; Potter et al., 2002). In addition, Duerden and Witt (2012) recommended important steps that educators should consider when carrying out implementation evaluations. First, Duerden and Witt recommended operationalized definition for program integrity components or elements, which "include adherence to an intervention, exposure or dose, quality of delivery, participant responsiveness, and program differentiation" (Carroll et al., 2007, p. 41; Dane & Schneider, 1998; Dusenbury et al., 2003; Mihalic, 2004), when studying implementation. Thus, Duerden and Witt related that a quality implementation evaluation should obtain information from as many key integrity elements as possible, which permits implementation research findings to be compared across disciplines and programs. Second, Duerden and Witt recommended that all key elements of the implementation system and program should be clearly and fully described to aid accurate effective measurement.

Measures and methods used to collect essential data tend to include observation, self-report, and participant report (Duerden & Witt, 2012). Duerden and Witt (2012) noted that observation data are the most dependable method for evaluating

implementation. However, the authors pointed out that financial and other factors may affect researchers' ability to carry out broad site observations pertaining to implementation, thus, an appropriate compromise may be telephone interviews. Duerden and Witt suggested that reliability can be determined from the use of both observation and self-report data, where the data can be compared. It is also imperative to obtain information from numerous sources about many aspects of implementation integrity (Dane & Schneider, 1998; Duerden & Witt, 2012). Duerden and Witt suggested that researchers link findings to program outcome data with the goal to make full use of implementation data. Duerden and Witt reiterated that implementation affects program outcomes in many ways and by examining this relationship, researchers can obtain increased understanding into program efficacy. Duerden and Witt explained numerous benefits in relation "to quality implementation evaluations, such as (a) increased validity of outcome findings, (b) better picture of how programs are implemented, (c) greater understanding of program outcomes, (d) improved dissemination of best practices, and (e) more opportunities for making informed program improvements" (p. 6). Duerden and Witt noted that implementation evaluation that are effective need educators to be fully knowledgeable about what a program is expected to achieve and how it is supposed to be carried out.

A program or practice such as BL, which may be effective in certain schools may be ineffective in other schools if it is not being implemented in line with its original design (Perlman & Redding, 2011). As a result, differences in outcomes have prompted an increased interest in implementation science, with focus on the FOI (Perlman &

Redding, 2011). Perlman and Redding (2011) discussed implementation gap, which occurs when the practice or program from the beginning is not applied with fidelity, or a successful implementation may dissolve with turnover and time. It is important to ensure that the main components of a program are carried out as designed, which may include the content, basic program structure, and method of delivery (Crosse et al., 2011; Perlman & Redding, 2011). Perlman and Redding related that plans for monitoring FOI should begin when programs are being considered for adoption. Fixsen et al. (2005) noted that when key elements of an intervention practice or program are clearly defined, the more smoothly the practice or program can be successfully implemented. Programs that are often implemented with fidelity include those that are put together to streamline the implementation task and programs that pair well with the target population and school site needs (O'Connell, 2007; Perlman & Redding, 2011).

Failure of the school staff to have key elements in place may be due to inadequate preparation and staff training as well as the staff being unwilling to move away from comfortable programs or practices (Perlman & Redding, 2011). Therefore, when a program is selected, the staff should be prepared by being trained, given opportunities to practice, and provided with coaching as needed, for proper program implementation to take place (Guldbrandsson, 2008; Perlman & Redding, 2011; Randel et al., 2016). Perlman and Redding (2011) also highlighted the importance of continued monitoring of the program or practice to ensure that it is being implemented as designed as well as its effect on student learning, so that school personnel can modify their efforts to make the program or practice work. Perlman and Redding explained that the FOI ongoing

assessment helps in figuring out whether the program implementation or the program is responsible for the issue if the anticipated positive effect does not occur.

Six action principles are targeted at the state and district levels (Perlman & Redding, 2011). First, Perlman and Redding (2011) discussed consideration being placed on possible problems with implementation when fresh or new programs are selected and then being ready to address those problems. Second, the authors noted that for state- and district-wide program implementation, support material and comprehensive training should be provided for staff, in addition to opportunities for teachers to practice and given helpful feedback. Third, Perlman and Redding recommended "calibration checks" (p. 82) that teachers use to monitor their own implementation. Fourth, the authors related that principals should be included in training and focus should be placed on how the program will actually look in practice, which will help principals give effective feedback and monitoring on a continuous basis. Fifth, the researchers discussed the need to develop a plan for monitoring program implementation, such as collecting data, observing the program as implemented, data analysis, and planning and addressing implementation that is off course. Sixth, Perlman and Redding recommended that the data collected in relation to FOI should be used to identify probable causes for why programs are not performing as anticipated.

Implementation has been connected to student learning as effective innovations and effective implementation efforts result in improved outcomes in education (Hagermoser Sanetti et al., 2014; Protheroe, 2008; Wallace et al., 2008). Wallace et al. (2008) reported that teachers are the interventions because they are the individuals who

deliver the intervention through their words and actions. Schools that have high implementation levels and high implementation uniformity among program components, showed improvements in achievements, particularly in reading and math (Aladjem & Borman, 2006; Protheroe, 2008). Aladjem and Borman (2006) found that there were major gains in student achievement at schools where the *success for all* comprehensive school reform (CSR) model was implemented. Aladjem and Borman noted that the success for all instruction and materials may have resulted in higher implementation levels, which led to higher achievement levels.

Four factors that affect FOI include (a) complexity, (b) materials and resources required, (c) perceived and actual effectiveness (credibility), and (d) interventionists (Johnson et al., 2006). First, complexity refers to the intervention complexity as more complexity tends to result in lower fidelity due to the level of difficulty (Johnson et al., 2006). Second, in relation to materials and resources required, when new or a considerable amount of materials and resources are required, they should be easily available. Third, perceived and actual effectiveness (credibility) pertains to teachers' belief about the approach effectiveness, such as the belief that an approach is inconsistent or ineffective with their style of teaching, thus, it will not be implemented well (Johnson et al., 2006). Fourth, interventionists pertain to factors that affect the FOI level, such as the expertise, number, and motivation of the people who carry out the intervention (Johnson et al., 2006). Wallace et al. (2008) discussed core components, which are crucial elements of a practice, as another element that affects FOI because they are vital to the possibility of achieving positive results. Thus, Protheroe (2008) explained that

when the key elements of an intervention are clearly known and defined, the easier it is for the innovation to be successfully implemented.

Implementation efforts may fail because individuals undervalued the range or significance of preparation (Leonard-Barton & Kraus, 1985). Thus, school instructional leaders need to be active in dealing with this issue, regardless of whether the curriculum or program is initiated at the district-level (Protheroe, 2008), such as the BL program. Wallace et al. (2008) found that practice or training alone was inadequate in ensuring the accurate implementation of a program. Hence, a coaching component is important as it helps teachers learn how to properly use new skills in the classroom (Joyce & Showers, 2002; Protheroe, 2008). Gunn (2004) suggested five components that school leaders and teachers should use when preparing for and working with a new instructional approach or program: (a) learning the program; (b) staff observation of the practice in operation; (c) teaching time where teachers become comfortable, fluent, and examine how the approach works with their students; (d) teachers being observed by other trained staff members; and (e) refinements being made based on observation feedback and team meetings or grade-level, where the practice or program and its implementation are discussed, as well as ways teachers can check or monitor their own implementation.

Principals need to be knowledgeable about the adopted program or strategy, should place emphasis on observing classrooms during the first phase of implementation, and assist with fidelity without evaluation (Gunn, 2004). In addition, Protheroe (2008) also suggested that principals should create opportunities for formative assessment of teachers' implementation and work with teachers so that they can establish ways to keep

an eye on implementation. Protheroe also recommended periodic reviews of program implementation, such as assessing if the program or practice is being implemented as planned, whether the most important program elements are in place, and enabling staff to revise and adjust their efforts with the goal of making a program work at a particular location. Wallace et al. (2008) emphasized that principals and teachers should implement the program with high levels of fidelity, evaluate the intended outcomes, and assess how to improve the program to better meet the needs of the school while preserving and increasing the outcomes.

Demonstrating program impact is challenging due to factors such as poor or different implementation levels (Boardman et al., 2016). Issues of fidelity pertaining to the degree to which participants who are participating in the program receive the intended full protocol, may be especially significant for students who have disabilities because some of these students need specialized or a particular type of instruction to make educational improvements (Boardman et al., 2016; Lipsey, 1999; Zigmond et al., 2009). Therefore, teachers who select parts of a model or implement low quality instructional programs must be careful as they may not be giving instruction that contain components that are important for students with disabilities. Boardman et al. (2016) examined how FOI of collaborative strategic reading (CSR) is related to adolescent reading outcomes, which included "students with mild to moderate disabilities" (p. 644). The researchers used data from two studies that focused on CSR implementation. Study 1 focused on "CSR implemented in Grades 7 and 8 language arts and reading classes" (p. 646), where the researchers "examined outcomes for CSR students in relation to teacher fidelity"

(Boardman et al., 2016, p. 646). Study 2 included data from "CSR implemented in Grades 6 through 8 social studies and science classes as part of a district initiative for accelerating reading comprehension" (p. 646) throughout the district, where Boardman et al. replicated the analysis in Study 1 with a different data set with students and teachers. Findings indicated that students "in both studies did not improve as a function of quality or dosage" (Boardman et al., 2016, pp. 653-654). Therefore, additional instruction in CSR was not related to higher student reading gains. Boardman et al. noted that there were extensive differences across teachers and nearly "twice as much exposure to CSR in Study 2" (p. 644); however, the quantity of CSR dosage or instruction was not correlated to variations in student reading outcomes from the students who have disabilities or the full sample, which is consistent with past research findings (e.g., Dane & Schneider, 1998; Hamre et al., 2010). On the other hand, results showed a positive "relationship between the quality of CSR instruction and students with" (Boardman et al., 2016, p. 644) mild to moderate disabilities. Thus, the researchers found an association between disability students' higher posttest reading comprehension scores and higher quality of CSR instruction.

Research is lacking that focuses on studying and documenting curricular FOI (Moon & Park, 2016). As a result, Moon and Park (2016) examined the types of changes that were made during a curricular intervention implementation for gifted learners in ELA across self-contained and pull-out models to identify areas that should be considered when developing curriculum for gifted learners. In the study, the researchers randomly assigned schools to control or treatment conditions. Exactly "27 experimental teachers

participated in the first year of the study (Cohort 1) and 24 teachers participated in the

second year of the study (Cohort 2)" (Moon & Park, 2016, p. 66). Observation and

semistructured interviews were used to collect data from Cohorts 1 and 2, and self-

reported teachers' logs were used for Cohort 2. Data from observations and interviews

were coded to understand how "each curriculum unit was implemented with fidelity and

to describe those aspects of the curricula that were modified" (Moon & Park, 2016, p.

67). Findings indicated that teachers chose to change the curricula in different ways that

were more detrimental than productive, with more negative modifications made among

pull-out classroom teachers. Results also suggested that adaptation to the curricula

seemed inevitable. Moon and Park concluded that teachers are given information about

how to change the curriculum for their classrooms and the need for them to understand

the main curriculum components that are important and cannot be changed to achieve the

desired outcomes.

Historical Context of the Balanced Literacy Framework

Debate over the most helpful way to help children learn to read and write has

been taking place for decades and is often termed "reading wars" (Adams, 1990;

Bingham & Hall-Kenyon, 2013, p. 14; Fletcher, 2014). The debate centered on figuring

out the instructional method that was most helpful in assisting children attain higher

reading achievement, and there were differing views on both sides of the debate

(Bingham & Hall-Kenyon, 2013). On one side of the debate is the argument for skilled-

based instruction, where the focus is on children being taught skills in phonics as the

important connection for children to start reading and writing and is often called inside-

out or bottom-up process (Bingham & Hall-Kenyon, 2013; Evans et al., 2004; Whitehurst & Lonigan, 2001). The inside-out process is beneficial to children as it helps them to build skills such as phonics, spelling, grammar, and alphabetic principles so that they can understand what they are reading (Bingham & Hall-Kenyon, 2013). On the opposite side of this debate is "a holistic view of instruction" (p. 15), where the focus is on children naturally constructing ideas and acting out writing and reading behaviors as they connect with their environment, which is often referred to as outside-in or top-down process (Bingham & Hall-Kenyon, 2013; Evans et al., 2004; Whitehurst & Lonigan, 2001). The outside-in process focuses on the importance of reading, enjoying, and experiencing "texts through authentic reading experiences in which reading is viewed more as something that is learned, rather than something that is taught" (Bingham & Hall-Kenyon, 2013, p. 15; Smith, 1971). Educators have so far settled the debate by compromising or taking "a balanced approach to literacy instruction" (Bingham & Hall-Kenyon, 2013, p. 15; Duffy, 2001; Pressley et al., 2002; Rasinski & Padak, 2004; Snow et al., 1998; Tarat & Sucaromana, 2014). Therefore, the majority of educators would recommend that teaching or literacy instruction should include the interaction between skilled-based facets of reading, such as alphabetic knowledge, phonemic awareness, and letter-sound association, in addition to the meaning-based facets of reading such as comprehension and vocabulary (Bingham & Hall-Kenyon, 2013).

The BL termed originated in California in 1996 to address reading scores that were low on a national examination, thus, the new BL curriculum was implemented (California Department of Education, 1996; Frey et al., 2005). BL evolved from ideas of

balanced approaches and instruction (Policastro, 2018; Policastro & McTague, 2015). Policastro (2018) reported that for over 2 decades, BL pedagogy has been used in schools and classrooms. Policastro discussed the uncertainty of teachers and support staff personnel about the BL framework and how it is carried out in classrooms across the school. BL is described as "a philosophical orientation that focuses on reading and writing achievement that are developed through instruction and support in many environments, where teachers use different approaches that vary by teacher support and child control levels" (Frey et al., 2005, p. 272). Hence, there are multiple approaches to teaching reading, but instead a balanced approach to literacy development (Fitzgerald, 1999; Policastro, 2018).

The BL approach uses authentic texts and tasks with focus on comprehension, writing, literature, and reading response as well as word identification, phonics, writing, and spelling, which makes it a challenging concept as a pedagogy for teachers new to BL instruction (Pearson, 2002; Policastro, 2018). An important component within the BL instruction is the teacher deciding each instance on the most appropriate way to continue with the instruction (Policastro, 2018; Policastro & McTague, 2015; Policastro et al., 2016). Policastro (2018) related that the teacher's deliberate decision-making is the foundation for daily instruction, which is guided by a formative assessment process that is designed and refined to align with the BL tenets. BL instruction is different from other approaches due to the time assigned for comprehension and decoding, where additional time for phonics education is given in K through first grade compared to higher grades (Teach For America, 2011). Focus is placed on component skills, and the setting in which

decoding, and comprehension skills are instructed and practiced changes based on students' language and literacy needs (Teach For America, 2011).

Components of Balanced Literacy

The balanced approach to instruction is a full literacy view that blends guided practice, explicit instruction, independent writing and reading, and collaborative learning (Policastro, 2018; Tompkins, 2013). More specifically, the five main BL reading components include shared reading; interactive read aloud; independent daily reading; guided reading or small group instruction that includes guided reading, partner reading, skill groups, book clubs, and conferences; and word study that includes phonics, grammar, mechanics, spelling, and vocabulary (Learning A-Z, 2018; Policastro, 2018; WOBOE, 2016). The four main BL writing components include modeled writing, shared/interactive writing, guided writing, and independent writing (Learning A-Z, 2018; Policastro, 2018; WOBOE, 2016).

Shared Reading. Shared reading includes whole or small group instruction (Policastro, 2018). In addition, shared reading includes interactive reading where students "join in or share the reading of a big book or other enlarged text while" (p. 4) the teacher guides and supports them (Frey et al., 2005; NHSD, 2018; WOBOE, 2016). Students also observe the teacher reading the text with fluency and expression (Frey et al., 2005; NHSD, 2018; WOBOE, 2016). For example, "the teacher and the whole class read a common text together, while the teacher emphasizes rhyming words" (Frey et al., 2005, p. 275). Shared reading materials include big books, lap books, text project on smart board, poetry, songs, morning message, and classroom news (WOBOE, 2016).

Interactive Read Aloud. Interactive read aloud includes whole or small group instruction, where teachers read the book to students, and they are the only ones with copy of the text (Frey et al., 2005; Policastro, 2018). Thus, interactive read aloud includes teachers using read aloud books to develop students' understanding about content areas or a theme, as well as to model a specific comprehension strategy. In addition, teachers use vocabulary words to clearly teach and mark areas that are key "for questions and for thinking aloud about reading comprehension strategies" (Frey et al., 2005; NHSD, 2018; WOBOE, 2016, p. 6). Teachers decide when to pause reading to model thinking aloud so they can demonstrate the thought process that good readers use when reading text (WOBOE, 2016). In addition, teachers plan when it is time to leave open space for accountable talk, where students turn and talk to a partner, as well as time for record thinking and thought process by using post it notes (WOBOE, 2016). Students also learn to deeply reflect about the text, listen to others, and create their own ideas (Frey et al., 2005; NHSD, 2018; WOBOE, 2016).

Independent Daily Reading. Independent daily reading is done independently as students read text, which may be teacher recommended or self-selected, and this is done at their own independent reading level so that they can practice reading strategies, as well as obtain fluency and automatic word recognition (Frey et al., 2005; NHSD, 2018; WOBOE, 2016). During this time, students "practice what good readers do and apply the skills that they were previously taught during the mini lessons" (WOBOE, 2016, p. 7). In classroom nooks, students read while the teacher has individual reading meetings or conferences with small groups of students for strategy lessons, guided reading, or book

clubs (NHSD, 2018; WOBOE, 2016). Thus, the teacher has one-on-one discussion with students, prompts them to use strategies, discuss different parts of the book, "and learns about each student as a reader" (NHSD, 2018, p. 1; WOBOE, 2016). Students may use writing, discussing, or sketching as a meaningful way to reply to the text (NHSD, 2018; WOBOE, 2016). The teacher holds students responsible for reading their graphic organizers, reader's response notebook, post its, and partner reading (NHSD, 2018; WOBOE, 2016).

Small Group Instruction or Guided Reading. Small group instruction may also be called strategy groups or guided reading groups (Frey et al., 2005; NHSD, 2018; Policastro, 2018; WOBOE, 2016). Thus, small group instruction includes guided reading, partner reading, skills groups, book clubs, and conferences (Frey et al., 2005; NHSD, 2018; Policastro, 2018; WOBOE, 2016). Guided reading is often referred to as the cornerstone of BL and pertains to small group reading instruction, which provides different teaching that helps students in obtaining reading proficiency (Pinnell & Fountas, 2010; Policastro, 2018). The teacher places students who have the same reading level together so that they can read books at their instructional level (NHSD, 2018; Pinnell & Fountas, 2010; WOBOE, 2016). Although there are differences among students, the students' group reading level are similar enough, so they can be successfully instructed in a group (Pinnell & Fountas, 2010). The teacher chooses a book that students are able to process effectively with instruction as the teacher selects the text from a collection organized along a difficulty level (Pinnell & Fountas, 2010).

Guided reading groups are dynamic, flexible, and can change (WOBOE, 2016). The students engage in reading and talking, as well as writing, in relation to interesting and engaging fiction and nonfiction texts (Pinnell & Fountas, 2010; WOBOE, 2016). Embedded skills include phonics, word study, vocabulary, grammar, and mechanics, and questions are prompted so that students can develop higher order level thinking and strategic reading (WOBOE, 2016). Student assessment is continuous and entrenched in the instruction (WOBOE, 2016). Pinnell and Fountas (2010) discussed eight important components of reading instruction in guided reading lessons, which include the following:

1. All teaching in guided reading lessons have the main goal of teaching reading comprehension.

2. The teacher provides a sequence of high-quality, engaging texts that support individual progress on a scale of text difficulty.

3. Guided reading lessons increase the quantity of independent reading that students can complete.

4. Guided reading lessons provide explicit instruction in fluency.

5. Guiding reading lessons provide daily opportunities to expand vocabulary through reading, conversation, and explicit instruction.

6. Guided reading lessons include teaching that expands students' ability to apply phonemic awareness and phonics understandings to the processing of print.

7. Guided reading lessons provide the opportunity for students to write about reading.

8. Guided reading lessons create engagement in and motivation for reading. (pp. 3-10)

Word Study. Word study refers to the study of the alphabetic symbol system (NHSD, 2018). It includes phonics in relation to letter and sound relationship, grammar, mechanics, spelling, vocabulary, morphemic analysis in relation to the use of word parts to convey "meaning, and automaticity for sight words" (NHSD, 2018, p. 1; WOBOE, 2016). In addition, word study includes decoding or reading and encoding in relation to spelling and phonics of the alphabetic symbol system so that students can create meaning from a writer's message and express meaning by making their own message (NHSD, 2018).

The teacher provides instruction that is direct and systematic in the English language, thus, students can easily interpret and comprehend (Teach For America, 2011). The teacher develops "phonological awareness by having students participate in activities that help them to hear rhymes, syllables, and onset" (p. 54; initial phonological unit of any word)/rimes (the string of letters of that follow, which are normally a vowel and final consonant; Teach For America, 2011). Word study helps to enhance students' phonics skills by clearly instructing students on sound-spelling correspondences as well as decoding and patterns skills (Teach For America, 2011). Teachers build students' structural analysis and work skills by teaching them how to use components of words,

such as suffixes, prefixes, and Greek and Latin roots, so that they can decode

multisyllable words and understand word meaning (Teach For America, 2011).

Modeled Writing, Shared/Interactive Writing, Guided Writing, and

Independent Writing. The BL writing components include shared/interactive writing,

guided writing, modeled writing, and independent writing (Learning A-Z, 2018;

Policastro, 2018; WOBOE, 2016). Modeled writing refers to teachers creating, writing,

and thinking aloud (WOBOE, 2016). Modeled writing is the most popular teacher-

directed approach as the teacher writes and creates text in front of students, controlling

the pen, and constantly thinks out load about writing skills and strategies (WOBOE,

2016). Shared/interactive writing pertains to teachers modeling thinking aloud as they

write so that students can see how good writer's thought process works (WOBOE, 2016).

Students take part by listening to the teacher's thought process (WOBOE, 2016).

Students speak with a partner or in whole-class discussions and try out writing skills and

strategies with the teacher's help (WOBOE, 2016). The teacher transcribes with student

participation and collaboration as the teacher composes an enlarged text with the students

(WOBOE, 2016). The teacher writes the easy or difficult parts for the students, students

participate by writing parts of the text, and at the conclusion, both the teacher and

students have created a text that is conventional with correct spelling and punctuation

(WOBOE, 2016).

In relation to guided writing, students write and create in small groups as the

teacher directs the process (Teach For America, 2011). "The teacher works with the

whole class or a small group of students who have similar needs and coaches them as

they write a composition" (Teach For America, 2011, p. 133). Therefore, "the students take on the actual drafting responsibilities as the teacher presents a structured lesson that guides the students through the writing process" (Teach For America, 2011, p. 33). Independent writing pertains to students reading a text or book to themselves without the teacher's instruction or support (Frey et al., 2005). Students write and create while the teacher monitors their progress and intervenes when it is appropriate (Teach For America, 2011). Thus, students are in charge of the writing using "an independent writing model" (p. 134), where they write stories, paragraphs, sentences, or essays (Teach For America, 2011). Independent writing can be implemented in writing workshops, writing centers, letter writing, and journal writing (Teach For America, 2011).

Summary of BL Reading and Writing Components. Each school day, teachers' classroom instruction normally includes a daily literacy routine where they use shared reading, interactive read aloud, small group instruction or guided reading, independent daily reading, word study, shared/interactive writing, modeled writing, guided writing, and independent writing (Learning A-Z, 2018; Policastro, 2018; Teach For America, 2011; WOBOE, 2016). Therefore, "teachers read to students during the read aloud, read with students during shared reading and guided reading, and listen to and assess students' reading during independent reading" (Teach For America, 2011, p. 141). During word study, teachers provide clear and methodical instruction based on literacy components, using word and structural analysis, book and print awareness, phonics and the alphabetic principle, and phonological and phonemic awareness (Teach For America, 2011). In addition, teachers plan their writing lessons, which allows them to talk with students

during their independent writing, show students excellent writing, and "share the pen with students during shared and interactive writing" (Teach For America, 2011, p. 141). There are many independent facets of literacy that must be balance at the same time (Madda et al., 2007; Policastro, 2018). For instance, in a classroom where the BL program is used, the teacher may be working with a small-guided reading group and within group, could give different instruction to each student (Policastro, 2018). Simultaneously, the teacher is closely monitoring students working independently at literacy centers (independent or small groups) as well as monitoring students reading and writing independently (Policastro, 2018; Policastro & McTague, 2015).

Implementation of Balanced Literacy

Based on contemporary education policies such as the 2004 Individuals with Disabilities Education Improvement Act and the 2011 Race to the Top Act, it is the responsibility of teachers to enhance the academic performance of all students though the use of evidence-based teaching practices (EBPs; McKenna et al., 2014), such as the BL approach. However, McKenna et al. (2014) reported that using only EBPs does not guarantee that students will gain from these practices and increase their social, academic, and behavioral outcomes. The researchers noted that variability in implementing EBPs may negate or limit their potential benefits. There are four factors that may negatively affect teachers' EBP use, such as (a) the intervention or practice difficulty, (b) access to resources and materials that are needed to carry out the program, (c) practitioners may be different in the way they view the intervention's effectiveness and the intervention's actual effectiveness, and (d) the people's characteristic who are delivering the

intervention, such as their skills and motivation (Johnson et al., 2006; McKenna et al., 2014). In addition, due to the many demands on teachers' time as well as other school-based concerns, many of them require continuing support to carry out interventions as planned (McKenna et al., 2014; O'Donnell, 2008; Schulte et al., 2009). Thus, McKenna et al. noted that it is important that school professionals consider fidelity, establish to what degree EBPs are implement with fidelity, and if necessary, act to enhance classroom practices.

School practices and interventions can be ineffective due to poor implementation but can be improved when carried out with high fidelity levels (Foorman & Moats, 2004; Levin et al., 2010; McKenna et al., 2014; McKenna & Parenti, 2017). Students have great achievement gains when implementation fidelity levels are high (McKenna et al., 2014; Ysseldyke & Bolt, 2007). Therefore, McKenna et al. (2014) reported that it is important that educators measure fidelity to increase instructional effectiveness as well as establish if teacher practices are positively affecting student outcomes or whether changes are needed. When educators measure fidelity, they can use the results to decide if a practice was not effective due to poor implementation or whether there was a failure to pair the intervention or practice to students' needs (Johnson et al., 2006; McKenna et al., 2014). Thus, McKenna et al. related that when measuring fidelity, educators should consider whether the absence of student response is due to inappropriately delivering the intervention or due to the inadequacy of the intervention. It is therefore challenging to determine if an intervention or program is appropriate, without first establishing the level

to which students are given lessons as it was planned (Keller-Margulis, 2012; McKenna et al., 2014).

Educators can use indirect and direct methods to measure fidelity (Keller-Margulis, 2012; McKenna et al., 2014; Piasta et al., 2015). McKenna et al. (2014) reported that when educators are making decisions pertaining to the types of data that are possible to collect, they should consider different dynamics, such as time as well as matching the data collection method to the types of data they plan to evaluate. McKenna et al. recommended the use of multiple methods to assess fidelity, such as (a) observation, (b) analysis of permanent products, and (c) self-assessment.

Fidelity can be assessed by observing teachers' behavior (McKenna et al., 2014). The researchers explained that observers should be individuals who are knowledgeable in the curriculum or intervention so that they can establish the level to which teachers follow key elements and procedures (Crawford et al., 2012; McKenna et al., 2014). McKenna et al. (2014) explained that a checklist that contains the main elements of the intervention should be created before observing teacher behavior. The observation should be focused; therefore, the checklist should include important elements of the instruction or intervention that encourages student performance, which may be completed through task analysis (McKenna et al., 2014; Ruiz-Primo, 2005). McKenna et al. noted that main elements may include certain activities as well as time used to complete specific activities; thus, when measuring fidelity, the observer may also assess if all activities of a specific intervention or curriculum were completed in the correct sequence and within the given time (Durlak & DuPre, 2008; McKenna et al., 2014).

Self-assessments can be used to measure fidelity as teachers can use checklists to self-assess their practice with the goal of improving intervention fidelity (Hansen et al., 2014; Keller-Margulis, 2012; McKenna et al., 2014). McKenna et al. (2014) reported that after teachers have delivered an intervention or curriculum, they can be self-reflective and document on the checklist the aspects of the intervention they found difficult. The researchers noted that teachers can then obtain additional support to improve their practice, such as getting retrained or being coached by colleagues who are proficient in using the intervention. Although there are advantages to self-assessment because it can be completed without the help of other staff members, self-reports can also be inaccurate, hence, the need to use various methods to measure and improve fidelity (Jobe, 2003; McKenna et al., 2014). For example, self-reports can be confirmed using observations as teacher and observer perspectives can be compared and contrasted (McKenna et al., 2014; McKenna and Parenti, 2017). In addition, self-assessment data may be supplemented with videotaping the intervention delivery, where a person who is knowledgeable about the curriculum or intervention, can watch the videotape, fill out a fidelity checklist, then share the findings with the teacher at a consultation meeting to assist the teacher with improving instruction (McKenna et al., 2014; Schulte et al., 2009).

Permanent products, such as student point sheets, student self-monitoring sheets, tokens, and charts can be used to measure fidelity (McKenna et al., 2014; Sheridan et al., 2009). They may be very beneficial when evaluating the fidelity of interventions that teachers use throughout the school day (McKenna et al., 2014; Noell et al., 2005). When permanent products are used to establish fidelity, teachers search for evidence that certain

parts of the curriculum or intervention were followed, such as students completing "all sections of their reading comprehension learning log worksheet" (McKenna et al., 2014, p. 19; Vaughn et al., 2011). McKenna et al. (2014) noted that the evidence would give the teacher an indication about the level at which students had understood the process of checking their comprehension as they read a text passage. The researchers noted that if teachers find the intervention confusing or students are struggling with specific reading comprehension elements, then teachers can use this information for future lessons, with the goal of assisting students by increasing their skills. However, using permanent products to measure fidelity is not always appropriate, such as when a subjective measure of implementation quality is needed (McKenna et al., 2014; Sheridan et al., 2009). In addition, permanent products can mistakenly reflect FOI, for instance, when they are finished before or upon finishing the intervention (McKenna et al., 2014; Noell et al., 2005). McKenna et al. noted that educators can address this potential concern by using observation to supplement the data.

As a result, student outcomes can be improved by evaluating intervention fidelity and using steps to improve academic behavior or procedures strategy (McKenna et al., 2014; Schultes et al., 2015). McKenna et al. (2014) emphasized that teachers should be provided with further feedback and coaching on the delivery of intervention when fidelity is low. Additionally, McKenna et al. noted that when fidelity is adequate, but students are still underachieving, teachers can reexamine and modify the intervention to better meet student needs.

Balanced Literacy, Student Success, and Academic Achievement

Although the BL framework may be accepted as a quality literacy instruction, teachers may operationalize the BL tenets differently (Bingham & Hall-Kenyon, 2013). Bingham and Hall-Kenyon (2013) investigated "teachers' beliefs about the importance of different literacy skills to children's reading and writing development, their beliefs about effective BL and teachers' reported implementation of BL instructional routines, and how their beliefs relate to their implementation of BL routines" (p. 15). Participants included 581 teachers from three school districts in the United States, who taught in school districts where school leadership promoted and supported a balanced literacy approach to teaching at the district and school level. Teachers taught different grade levels, where 67 taught kindergarten, 226 taught first and second grade, 147 taught third and fourth grade, and 141 taught fifth and sixth grade. Teachers also had different degrees, with 425 teachers had a bachelor's degree and 156 teachers had a master's degree. Furthermore, teachers had additional teaching certifications. Teachers completed questionnaires, to include the Theoretical Orientation in Reading Instruction scale (TORP), to assess teachers' practices and beliefs in relation to BL instruction.

Findings indicated differences in teachers' implementation of writing and reading routines, where teachers participated less often in writing activities (Bingham & Hall-Kenyon, 2013). In addition, Bingham and Hall-Kenyon (2013) found that teachers' implementation of BL routines was different in relation to the grade level they instructed but was not related to years of experience or additional certifications. Furthermore, results suggested that "teachers' participation in reading and writing routines was related to their

literacy beliefs, especially their belief in the importance of code-based literacy skills"
(Bingham & Hall-Kenyon, 2013, p. 14). Bingham and Hall-Kenyon recommended the
need for additional research, where researchers should focus on examining different data
sources when examining teachers' implementation of the BL framework. The researchers
emphasized that researchers should assess teachers' belief and self-reported practices, as
well as directly evaluate practices within the classroom. Bingham and Hall-Kenyon
explained that by combining observation and self-report data, researchers would be able
to obtain a better understanding of how teachers are carrying out BL instruction and how
their understanding and literacy beliefs may affect such practices.

One popular researched program that use a BL method is READ 180, a
commercially published curriculum for students in grades 4 through 12 (Lombardi &
Behrman, 2016). Lombardi and Behrman (2016) investigated the usefulness of READ
180 BL supplementary instruction program on enhancing underachieving students'
reading performance in a predominantly Hispanic urban high school in New Jersey,
which was classified as "significantly lagging in performance based on scoring at the
13th percentile" (p. 167). Lombardi and Behrman defined reading performance "as
achievement on a state-administered test of language arts" (p. 166). Participants included
all 358 students at the study site who were enrolled in Grade 10 during the 2010-2011
academic year. Thirty students were assigned to the READ 180 program and received 90
minutes of daily instruction in the READ 180 program "for one semester and then 90
minutes of daily instruction in English for the second semester" (Lombardi & Behrman,
2016, p. 168). On the other hand, students not in READ 180 were assigned to "a regular

45-minute English block for both semesters" (Lombardi & Behrman, 2016, p. 168).

Therefore, both groups received about 110 hours of English instruction, but the READ

180 group received an additional 110 hours of supplementary reading instruction.

Results suggested that English learners whose eight grade reading scores

projected that they would fail the high school graduation test gained or benefited from BL

supplementary program during the fall of the 10th grade, therefore, their reading scores

surpassed the pass mark on the high school graduation test given in the spring of Grade

11 (Lombardi & Behrman, 2016). In addition, Lombardi and Behrman (2016) found that

English learners who took part in the BL "program achieved higher scores in reading on

the high school graduation test than English learners who did not participate, even though

their initial reading status was lower" (p. 171). Results suggested that English learners in

the BL intervention had the largest progress in reading of any of the four subpopulations

(English learner in READ 180, English proficient in READ 180, English learner not in

READ 180, and English proficient not in READ 180). Therefore, Lombardi and Behrman

related that results of the study indicated that a BL intervention program benefited

English learners who originally predicted failure on their high school graduation test and

that a BL intervention program provided great help to English learners predicting failure

on the high school graduation test than to English proficient students predicting failure.

Balanced Literacy and Professional Development

School districts and school sites face specific challenges that may reach a crisis

point, for example, absenteeism, disruption, and low student performance (Levin et al.,

2010; Sahin et al., 2016; Stempel et al., 2017). As a result, Levin et al. (2010) reported

that educational leaders implement educational reforms to fix the problem after surveying

numerous alternatives, such as curriculum packages, new textbooks, software, and PD for

the staff before they decide. Levin et al. discussed the cycle where educational leaders

purchase new school materials and provide PD, then assess to see if there are positive

results in a few months after the reform is in place. The researchers noted that in about a

year when the anticipated improvements are not evident, educational leaders make the

decision that the reform was unsuccessful, and search for a new and improved one. Levin

et al. noted that this cycle is typical of the reform process as educational leaders assume

that the implementation of new materials and PD related to the reform will

instantaneously transform the school and relieve the targeted problem. Levin et al.

emphasized that this is normally not the case; thus, the search for solutions continue to

follow a recurring pattern with replacing a reform that is viewed as failure with a new

approach. The researchers noted each school is unique and cannot be changed by taking

the same approach. Hence, Levin et al. related that educational leaders' change strategies

should consider the unique characteristics of the school circumstances, such as student

characteristics, the school's prior experience with reforms, staff capacity, available

resources, and school leadership as well as the level of commitment to change.

There are numerous reasons that can be attributed to poor school reform

implementation, but two of the most popular are (a) failure to consider the resources that

will be needed to obtain success and (b) failure to obtain the right resources at the

beginning (Levin et al., 2010). Levin et al. (2010) noted that educational leaders may fail

to make preparation for the time commitments of their teachers and other staff members.

The researchers related that if longer instructional periods for literacy activities are needed, then teacher assignments and scheduling must be changed. Levin et al. explained that time for PD includes time assigned to formal workshops and PD but should also include time needed for instructional planning among teachers as well as evaluation and consultation by coaches with classroom teachers. However, the researchers noted that school leaders often do not make formal arrangements for these activities. Levin et al. related that school administrators can show genuine leadership in the reform process by finding the time to take part in teacher meetings, training, feedback, and classroom observations, and modeling good practices.

High quality or effective PD is defined as improving teachers' instructional practice and knowledge, thus, resulting in improved student learning (Baird & Clark, 2018; Darling-Hammond et al., 2009; Masuda et al., 2013; Teresa, 2014). Wei et al. (2010) reported that teachers in the United States had less opportunities for continual or sustained PD. However, Wei et al. noted that over the past decade, there was a rise in teacher PD participation in their particular content areas. Wei et al. discussed major PD characteristics that have substantial effects on student learning and teaching practice, such as PD being intensive, maintained over time, entrenched in teachers' everyday work in schools, and associated directly with the work that teachers do with students. In addition, Wei et al. noted that PD should be engaging teachers in active learning (both learning and teaching the content); clear about district policies in relation "to curriculum, instruction, and assessment; and structured to regular engage teachers in local professional-learning communities where problems are solved through collaboration" (p.

38). Guskey and Yoon (2009) noted that high-quality PD requires time that "must be well organized, carefully structured, purposely directed, and focused on content" (p. 497) and pedagogy. Summer institutes or workshops had a positive effect on student learning, especially if the PD is longer than a day and when teacher form supportive learning communities (Birman et al., 2000; Masuda et al., 2013; Yoon et al., 2007).

It is important to understand improvements that can be made in the teaching profession (Masuda et al., 2013). For teachers at different career stages, Masuda et al. (2013) explored what influences "their attitudes and willingness to engage in PD" (p. 6). Participants included 16 teachers who lived in a community that is ethnically diverse in Hawaii. There were "four preservice teachers, five beginning teachers (1-5 years teaching), four midcareer teachers (6-20 years teaching), and three late-career teachers" (Masuda et al., 2013, p. 8; more than 20 years teaching or retired). Participants took part in face-to-face interviews. Results showed that all teachers viewed PD as a way to continuously improve their pedagogical knowledge. Findings indicated that teachers early in their career were more likely to take part in different opportunities to increase their professional education or knowledge and they did not clearly differentiate between mandatory and voluntary sessions as they were open to attend PD sessions. However, Masuda et al. found that teachers with more years of experience had obtained a depth of skill and knowledge and were also more discerning about the PD they chose to attend. Thus, they selected PD that would give them new knowledge, for example, using new technologies. In addition, results suggested that teachers at all career stages were clear that the PD content should be relevant to their own teaching contexts, such as the grade

level, subject they taught, or pertaining to student demographics. Birman et al. (2000)

noted that for PD to be meaningful to teachers, they need to be actively engaged in

pedagogy and content.

Although PD may increase teachers' knowledge, it may not result in changes to

teacher practices (Bartlett, 2017). Bartlett (2017) described how one school combined

ongoing PD, administrator expectations, and support from a coach in an effort to

strengthen the use of BL practices. Bartlett reported that in 2014, the Nunavut

Department of Education in Canada adopted a BL approach and in the 2015-2016

academic year, a learning coach position was added to each school to help teachers

improve their literacy instruction. Bartlett focused on a K through six grade school in a

remote community. School staff were surveyed in May 2016 to obtain information about

staff knowledge and use of BL. Findings indicated that when PD is combined with

coaching it tends to be more successful in impacting teacher practice. Thus, results

suggested that the staff felt more knowledgeable about BL as the teachers were able to try

new strategies with clear understanding by all staff that these were not negotiable

expectations. Bartlett made seven recommendations, which other school leaders may

want to consider as they work toward implementing a literacy initiative:

1. Teacher, coach, administrator, and regional goals need to be aligned and
   communicated.

2. Additional PD aligned with school goals combined with follow-up support
   from a coach must be provided.

3. PD must be linked to expectations for changes in teacher practice.

4. The role of the learning coach must be clearly defined and linked to school
   goals.

5. Administrators and learning coaches must collaborate in their use of
   responsive and directive coaching methods.

6. Time must be provided for teachers to implement new strategies.

7. The principal must be supportive and knowledgeable about literacy and be
   willing to address school culture issues. (pp. 108-111)

Implications

In the education field, few topics have generated as much debate and interest as the teaching of reading (Frey et al., 2005). School districts such as those in North Carolina, have implemented programs for literacy reform by concentrating on the BL framework qualities to address the elementary student literacy issue (Frey et al., 2005). This project added to the literature by filling a gap in the education literature with respect to the FOI of a BL program in a school district's ELA classrooms and determined in what ways the delivery of instruction replicated the original instructional design based on perceptions of elementary teachers and support staff personnel. The results of this study could be used by academic leaders, school officials, support staff personnel, teachers, literacy facilitators, PD coaches, and other stakeholders to determine if the BL program is being implemented as intended in the school district and if further PD for ELA teachers and support staff personnel is needed or any other action to support the implementation of the program as designed. Thus, findings may be used to further support students' literacy learning skills and improve their academic success.

Although BL has been used in Cityside School District, ongoing student literacy problems remain. One solution might be the final project that focused on effective or high-quality PD for ELA teachers and support staff personnel, to provide them with possible improvements in their instructional practice and knowledge that would result in improved student literacy learning. Upon completion of this study, I will provide district leaders and participants an executive summary and a white paper or potential PD materials that may be used to support the identified needs perceived by the participants. Therefore, the implications for positive social change stemming from this study at the local level is that there is a concrete benefit to the district leadership as the product provided may facilitate any needed changes or may prompt further study of BL implementation by district staff. Thus, findings will inform district stakeholders of the status of the BL program implementation as designed. Evaluating program integrity provides stakeholders, such as administrators, evaluators, funders, teachers, and program staff with important information (Duerden & Witt, 2012; Rossi et al., 2004). "Program outcome and implementation data allow educators to understand what happened during program implementation and the resulting effects or outcomes" (Duerden & Witt, 2012, p. 6). In turn, Duerden and Witt (2012) reported that this knowledge increases educators understanding so they can improve future services, know their current program offerings, and better serve those that they are working to help.

Summary

Current theory and research show the need for a comprehensive or balanced approach to literacy instruction to improve students' literacy (Bingham & Hall-Kenyon,

2013; Fitzgerald, 1999; McCardle et al., 2001; Rasinski & Padak, 2004). Although the BL principles seem to be widely accepted, there may be a research gap pertaining to how teachers implement BL instruction in their classrooms (Bingham & Hall-Kenyon, 2013). The purpose of this basic qualitative research study was to explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. As school leaders strategically plan to include fidelity assessment into their everyday practices, it is important to remember that "using more than one method of data collection is advantageous compared to relying on a single method" (McKenna et al., 2014, p. 20). In this basic qualitative research study, I used in-depth, one-on-one video conference semistructured interviews through Zoom, with teachers and support staff personnel at one school district.

In Section 1 of this project study, I included the local problem' rationale; definition of terms; significance of the study; and research questions; a review of the literature, where I address the literature search strategy, conceptual framework, and a review of the broader problem; the implications, and a summary. In Section 2, I include the research design and approach, participants, data collection, data analysis methods, data analysis results, discrepant cases, evidence of data quality, limitations, summary of findings, and a project deliverable.

Section 2: The Methodology

In this basic qualitative research study, I explored elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Elementary ELA teachers and support staff personnel are defined as educators; therefore, they are one population. I collected data for this study by using in-depth, one-on-one videoconferencing semistructured interviews through Zoom, with eight third through fifth grade urban elementary school ELA teachers and two support staff personnel (an ELA instructional coach and a literacy facilitator) at one school district in a southeastern state. NVivo was used to manage the data and the data were analyzed using Moustakas's (1994) modified van Kaam method of analysis. The study was conducted in accordance with Walden University Institutional Review Board's (IRB) guidelines. The Walden University IRB approval number was 09-06-19-0257427. In Section 2, I include the research design and approach, participants, data collection, data analysis methods, data analysis results, discrepant cases, evidence of data quality, limitations, summary of findings, and a project deliverable.

Research Design and Approach

In this section, I present the research questions for this basic qualitative research study. I also discuss qualitative tradition and basic qualitative design rationale, which includes the justification for the use of the basic qualitative research design. I organized this section in the following subsections: description of the qualitative tradition and basic qualitative research design rationale.

To explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicates the original instructional design, I addressed the following research questions in this basic qualitative research study:

RQ1: What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?

RQ2: What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?

Description of the Qualitative Tradition

I used a basic qualitative research design to explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Purposeful sampling was used to collect data through in-depth, one-on-one video conference semistructured interviews through Zoom with eight third through fifth grade urban elementary school ELA teachers and two support staff personnel at one school district in a southeastern state. NVivo was used to manage the data and the data was analyzed using Moustakas's (1994) modified van Kaam method of analysis.

I considered a mixed method approach because the focus is on collecting, analyzing, and combining both qualitative and quantitative data in a single study, which provides a broader view of the overall issue (see Creswell & Plano-Clark, 2007; Moss, 2017; Tariq & Woodman, 2013). However, a mixed methods approach was not necessary in answering the two research questions in this study. I also considered a quantitative research method because it is a reliable method that "is based on numeric and methods that can be made objectively and" replicated by other researchers (Kalra et al., 2013, p. 192). However, a quantitative method was not used for this study because it provides less insight into participants' perceptions. Therefore, I used a qualitative research method in this study because this method can be used to understand participants' beliefs, experiences, attitudes, behavior, and interactions (see Kalra et al., 2013).

Basic Qualitative Research Design Rationale

Six qualitative research designs were considered for this study, which included the basic qualitative research design, case study, narrative inquiry, ethnography, grounded theory, and phenomenology (see Guetterman, 2015; Worthington, 2013). After performing an in-depth review of the six qualitative designs, I chose the basic qualitative research design. Merriam (2009) reported that a basic qualitative research study is used by researchers in understanding "(a) how people interpret their experiences, (b) how they construct their worlds, and (c) what meaning they attribute to their experiences" (p. 23). Thus, the basic qualitative research design helps the researcher to understand how individuals make sense of their lived experiences (Merriam, 2009). Merriam emphasized that the main purpose of educational qualitative research is to improve practices and the

basic qualitative research design is useful in obtaining in-depth understanding of effective educational processes. The aim of this study was to gain a better understanding of how elementary teachers and support staff personnel perceived the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design, thus, a basic qualitative research design was used.

Participants

In this section, I describe the eligibility criteria for study participants and explain the reason for the number of participants in the population and sampling procedures subsection. Additionally, I explain the procedures for gaining access to participants. Furthermore, I explain the methods used to create a researcher-participant working relationship and present measures that were be taken for the protection of participants' rights

Population and Sampling Procedures

The study's setting was a public-school district in southeastern United States. According to current data from Cityside School District, there were 174 schools (elementary grade levels [K-5], middle grades levels [6-8], and high school levels [9-12]), with approximately 148,299 students in K through 12th grade during the 2019-2020 academic school year. The student district population was 27.6% Caucasian, 37.5% African American, 25% Hispanic, and 6.9% Asian during the 2018-2019 academic school year (Glenn, 2018). County Health Rankings (2020) reported that 58% of students in Cityside School District are eligible for free or reduced-price lunch. However, data

indicated that more than 50% of students at Cityside School District are economically

disadvantaged, whereas 49.2% of students are economically disadvantaged across the

State of North Carolina (Helms, 2018; North Carolina School Report Cards, 2018). Data

from the Cityside School District indicated that there were over 9,000 teachers employed

during the 2019-2020 academic school year.

The NCDPI literacy framework includes the BL approach and the NCDPI

allowed school districts to develop their own BL practices and implementation

procedures (CMS, 2018; Public Schools of Robeson County, 2018). Cityside School

District ranked below the state reading proficiency level during the 2017-2018 and 2018-

2019 academic years (54.4% and 53.2%, respectively). The FOI of BL has not been

addressed in the district since BL was initiated in 2014 to address student literacy

achievement. ELA teachers have expressed a lack of understanding about the BL

implementation process (personal communication, August 30, 2016). Teachers reported

that support staff personnel have not thoroughly communicated the components

necessary to teach BL due to the limited amount of time available for PD and allotment

of teaching time in the classroom (personal communication, August 30, 2016). All

teachers were not provided with a consistent sequence of BL PD sessions to implement

the BL as designed, which varied in number of hours and content (personal

communication, December 14, 2016). I do work in the school district as a fifth-grade

teacher, but I did not recruit teachers or support staff personnel with whom I have a

professional or personal relationship to take part in the study.

When compared to the sample size in quantitative studies, the sample size is smaller in qualitative studies (Mason, 2010). Klenke (2008) suggested two to 25 participants, whereas Morse (1994) recommended at least six participants. I used a basic qualitative research design, where the targeted population of interest for this study were all third through fifth grade ELA teachers and support staff personnel such as the dean of students, an academic or literacy facilitator, literacy coach, PD coach, or head of the literacy department for the district. Elementary ELA teachers and support staff personnel are defined as educators; therefore, they are one population. Using purposeful sampling, I recruited third through fifth grade ELA teachers and support staff personnel in Cityside School District through social media, specifically LinkedIn and Facebook, thus, inviting potential participants who met the selection criteria to participate. I included eight third through fifth grade urban elementary school ELA teachers and two support staff personnel (an ELA instructional coach and a literacy facilitator) at the target school district in the study.

Table 7 shows the participants' demographics. It should be noted that Participant 1 and Participant 2 were the support staff personnel who provided data to address the second research question, and that Participant 3 through Participant 10 were ELA teachers who provided data to address the first research question.

Table 7

Participant Demographics

Partici-pant	Grades taught	Highest level of education	Years of teaching experience	Years of experience with balanced literacy
P1	Support	Master's	9	9
P2	Support	Master's	12	12
P3	3, 5	Bachelor's	6	6
P4	3-5	Bachelor's	6	6
P5	3	Bachelor's	7	7
P6	3	Master's	17	2
P7	3	Master's	38	2
P8	3, Sp. Ed.	Bachelor's	14	13
P9	3	Master's	27	12
P10	3	Bachelor's	12	12

Note. Sp. Ed. = special education.

Participants provided a rich holistic description that increased my understanding of the phenomena (see Harrison et al., 2017; Merriam, 1998). The criteria used to select participants were as follows: (a) employed as a third through fifth grade ELA in Cityside School District, (b) employed as a school official in Cityside School District, and (c) actively participated in the implementation process and procedures of the BL program in ELA classrooms.

In qualitative research studies, data saturation should be considered when researchers plan to interview participants (Fusch & Ness, 2015; O'Reilly & Parker, 2012; Walker, 2012). Thus, researchers must figure out how many interviews are sufficient to get to data saturation (Guest et al., 2006). Data saturation is reached when the researcher has provided enough information so that the study can be replicated, when no new information can be obtained, and when additional coding is no longer possible (Guest et

al., 2006; O'Reilly & Parker, 2012; Walker, 2012). For this basic qualitative research study, eight third through fifth grade urban elementary school ELA teachers and two support staff personnel at the target elementary school were used to find trends in participants' BL program experiences. The relationship between saturation and sample size were sufficient in this study because through purposeful sampling, the use of eight third through fifth grade urban elementary school ELA teacher interviews and two support staff personnel interviews, allowed me to obtain the richest data possible, hence, reaching data saturation.

Procedures for Gaining Access to Participants

I completed the Collaborative Institutional Training Initiative (CITI) research protections training. In addition, I complied with all state and federal regulations. After I received approval to carry out the study from the Walden University IRB, I recruited participants through social media, specifically LinkedIn and Facebook, thus, inviting potential participants who met the selection criteria to participate confidentially. Therefore, I posted the two social media posts and invitation letters to LinkedIn and Facebook groups. I obtained the necessary approval from the appropriate organizational representative. Organizational approval was implied by allowing me to post on their social media site, therefore, signed cooperation letters were not needed. Participants were be instructed on the invitation letter that if they were interested in taking part in the study, to click on SurveyMonkey link that was in the invitation letter, where they were able to review the consent form and provide implied consent by completing the demographic survey, if they were interested in taking part in the study. The social media post and

invitation letter as well as the consent form provided enough information about the

selection criteria to allow the participants to self-identify and self-select into the study;

thus, all volunteers were selected to take part in the study.

To ensure participants retained a copy of the consent form for their records, they

were informed on the form to save or print a copy. Once a participant completed the

demographic survey on SurveyMonkey, I proceeded to schedule an interview with the

participant. I conducted interviews at a time that was convenient for participants and the

interviews took place by video conferencing through Zoom. I ensured all participants'

privacy by conducting individual interviews; therefore, no group interviews took place.

Prior to the interviews, a $10.00 electronic Amazon gift card was given to

participants, which were texted to their telephone. Therefore, participants could withdraw

at any time during the study without feeling obligated or coerced to participate in the

study to receive a gift card at the end. I audio-taped the interviews, which took

approximately 45 minutes. Before I finished the interviews, I reminded participants that I

would be in touch at a future date by e-mail to carry out member checks. In addition, I

answered participants' concerns or questions and thanked them for taking part in the

study.

After I completed data collection, all interviews were transcribed, and data was

analyzed using Moustakas's (1994) modified van Kaam method of analysis. I conducted

member checks to improve the accuracy, credibility, and validity of the findings (see

Harper & Cole, 2012). I e-mailed a copy of the draft findings to participants, asked that

they check the authentic representation of what they conveyed during the interviews, and

provide feedback by e-mail (see Harper & Cole, 2012). I was available to answer questions by arranging a telephone or video conference to review any questions or concerns that participants may have regarding the preliminary findings. This process took about 25 minutes. Some participants acknowledged that they received the preliminary findings. However, the participants did not respond with feedback pertaining to the preliminary findings.

Upon completion of the doctoral study, I will share the findings by e-mailing an executive summary and a white paper or potential PD materials that may be used to support the identified needs perceived by the participants to all participants and district leadership. Data are kept secured in a password protected computer and locked file cabinet in my home office. I am the only one with data access. Data will be kept for a minimum of 5 years, which is in line with Walden University's guidelines. After the 5 years' time, I will responsibly destroy the data using means such as demagnetizing and shredding.

Methods of Establishing a Researcher-Participant Working Relationship

The relationship between the researcher and participants is important to quality of the research study (Algeo, 2013). Algeo (2013) reported that one of the first steps in creating a working relationship with participants is to find appropriate participants and get their consent to participate in the research study. In addition, Algeo noted that to sustain the researcher-participant relationship, a deep level of trust must be established and carefully nurtured throughout the research project. Furthermore, Algeo discussed the

creation of trust though the use of documents such as consent forms, codes of conduct, and assurances of participants' confidentiality and anonymity.

Therefore, in establishing a researcher-participant relationship in this basic qualitative research study, participants were given a consent form to sign before taking part in the study. In addition, to ensure confidentiality, the name of the school district and the identity of the study participants are confidential and are not identified in any of the study reports that I prepared as pseudonyms are used. After I collected the interview data, I removed all identifiable data that could identify the participants. I coded and numbered the interviews to correspond to each participant to protect their identities.

IRB approval was obtained before data collection began with participants and I answered all questions that participants had before, during, and after the interviews. Before taking part in the interviews, participants were given the $10.00 electronic Amazon gift card so that they could withdraw at any time during the study without feeling obligated or coerced to participate in the study to receive a gift card at the end. Participants were informed that they will be audio-recorded on the consent form. After the study is completed and approved, all participants and the district leadership will be provided with an executive summary and a white paper or potential PD materials that may be used to support the identified needs perceived by the participants. Thus, the researcher-participant relationship was supported by the ethical protection of participants such as those noted in the CITI research protections training as well as state and federal regulations.

Ethical Protection of Participants

I completed the CITI human research protections training. I abided by all state and federal regulations to ensure the ethical protection of research participants and I only began data collection after Walden University IRB had given their approval. I protected data that was produced from the interview questions by following Walden University IRB's guidelines.

Before I began each interview, I obtained participants' implied consent to participate in the study and to audio-record the interviews. I instructed participants on the consent form that they could save or print a copy of the form. In the consent form, I outlined participants' protections and ethical guidelines that were followed during the basic qualitative research study such as keeping their identities and data confidential, the voluntary nature of the study, risk, and benefits of being in the study, and their right to withdraw or stop at any time and for any reason. In the consent form, I also outlined any physical or psychological risks that they might experience. Furthermore, in the consent form, I explained that any part of the study that make participants uncomfortable does not have to be completed.

I respected and built trust with all participants during the data collection stage and research process. I protected participants' identities by keeping who they are confidential and removing all information that could identify participants after the interviews by coding and numbering the interviews to match each participant. I obtained participants' permission to audio-record the interviews and later made verbatim transcriptions, which I

asked participants to review later for accuracy. After data collection was complete, I analyzed the data.

Data, including audio-recorded interviews and transcriptions, are kept secured in a password protected computer and locked file cabinet in my home office. I am the only one with data access. Data will be kept for a minimum of 5 years, which is in line with Walden University's guidelines. After the 5 years' time, I will responsibly destroy the data using means such as demagnetizing and shredding. In the event that participants had any additional concerns or questions, I provided both my contact information and my chair's contact information. Additionally, the contact number of the Walden University research participant advocate was provided to participants in the event they wanted to talk about their rights privately. After the study is completed and approved, I will e-mail an executive summary and a white paper or potential PD materials that may be used to support the identified needs perceived by the participants to all participants and district leadership.

Data Collection

After I received approval to carry out the study from the Walden University IRB, I recruited participants through social media, specifically LinkedIn and Facebook, thus, inviting potential participants who met the selection criteria to participate. Therefore, I posted the two social media posts and invitation letters to LinkedIn and Facebook groups. Data collection procedures are discussed in detail in the procedures for gaining access to participants subsection in the participants section.

In this section, I describe and justify the data for collection, discuss each data collection information and source, explained sufficiency of data collection instruments to answer research questions, explain the systems for keeping track of data, and discuss the role of the researcher. I organized this section in the following subsections: justification for data collection methods, instrumentation, systems for keeping track of data, and role of the researcher.

Justification for Data Collection Methods

The key purpose of educational qualitative research is to enhance practices and the basic qualitative research design is helpful in gaining in-depth knowledge of effective educational processes (Merriam, 2009). A basic qualitative research design involves in-depth data collection though the use of multiple sources of information, such as interviews, observation, and archival records (Creswell et al., 2007; Merriam, 2009). Using a basic qualitative research design, I explored elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. I used two 45-minute researcher-developed interview guides to conduct individual in-depth, one-on-one video conference semistructured interviews through Zoom, with eight third through fifth grade urban elementary school ELA teachers and two support staff personnel. The telephone and video conference semistructured interviews were sufficient to answer the two research questions.

Instrumentation

I used two 45-minute researcher-developed interview guides to conduct individual in-depth, one-on-one video conference semistructured interviews through Zoom, with eight third through fifth grade urban elementary school ELA teachers and two support staff personnel. Raworth et al. (2012) related that semistructured interview are commonly used and are often the best way to learn more about the motivations behind people's beliefs, attitudes, choices, and behaviors, and how certain policies and events affect their lives. Raworth et al. also noted that semistructured interviews often provide additional valuable information that the researcher did not predict.

The interview questions were created to address the two research questions. All 17 interview questions in the interview guide for teachers were designed to address Research Question 1 (see Table 8). All 18 interview questions in the interview guide for support staff personnel were designed to address Research Question 2 (see Table 9). Table 8 reflects the correlation between Research Question 1 and the 17 interview questions on the teacher interview guide I designed. Table 9 reflects the correlation between Research Question 2 and the 18 interview questions on the support staff personnel interview guide I designed. The interview questions allowed me to link the questions asked in the individual interviews to the whole research and allowed me to locate certain ideas (Maher, 2013). I used probes to clarify answers, where participants were asked to expand and explain their responses, thus, providing a wealth of data and information for interpretation and analysis (see Bryman & Bell, 2007; Corbin & Strauss, 2008; Kvolve, 2007; Maher, 2013).

Table 8

Relation of Teacher Interview Guide Questions to Research Question 1

Research question	Interview question
RQ1. What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	**Effective Interventions** How do you implement balanced literacy in the classroom? How would you explain the purpose and goals of the balanced literacy program? Discuss your perception of the effectiveness of your balanced literacy training in relation to your instruction delivery. Explain if the balanced literacy training increased your motivation to implement the balanced literacy curriculum. How have you used each component in your classroom? How is this component working for you? Can you give an example? (Each component with its definition will be placed in front of participant. Please see the balanced literacy component list with the definitions at the end of the interview guide)? Shared reading Interactive read aloud Independent daily reading Small group instruction or guided reading Word study Modeled writing Shared/Interactive writing Guided writing Independent writing How might you modify a component of balanced literacy? **Implementation Methods** What resources, training, or additional support do you believe you might need to fully implement balanced literacy with fidelity? What would you like to add regarding teachers' motivation, support staff personnel's motivation, challenges, or recommendations for the implementation of balanced literacy program with fidelity or the way in which it was designed? On a scale of 1 to 10, how would you rate your implementation of the balanced literacy curriculum as it was originally designed in your personal classroom? Please explain your rating. What other strategies besides balanced literacy do you use to blend with the balanced literacy approach, if any? Please explain. **Enabling Contexts** What resources did you utilize prior, during, and after balanced literacy training? Describe how you have been prepared to deliver balanced literacy in your classroom. Describe your confidence in implementing balanced literacy after training such as professional development and observations occurred. What barriers to implementation did you face in relation to resources? What got in the way? What changes could be made so that the barriers could be minimized or eliminated? **Intended Outcomes** Describe your teaching beliefs/style and how it relates or differ from the balanced literacy philosophy. What role do teachers' and support staff personnel's beliefs and attitudes play in student outcomes? What factors of the balanced literacy program do you think contribute to student achievement and outcomes? Does balanced literacy achieve the student outcomes desired? Why or why not? Please describe in detail.

Note. FOI = fidelity of implementation; BL = balanced literacy; ELA = English language arts.

Table 9

Relation of Support Staff Personnel Interview Guide Questions to RQ2

Research question	Interview question
RQ2. What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	**Effective Interventions** Share the ways in which you have supported the balanced literacy initiative at your campus/school. How would you explain the purpose and goals of the balanced literacy program? Discuss your perception of the effectiveness of your balanced literacy training in relation to supporting balanced literacy instruction delivery. Explain if the balanced literacy training increased your motivation to implement the balanced literacy curriculum. How have you supported the use of each component in teachers' classrooms? How is this component working for the teachers? Can you give an example? (Each component with its definition will be placed in front of participant. Please see the balanced literacy component list with the definitions at the end of the interview guide)? Shared reading Interactive read aloud Independent daily reading Small group instruction or guided reading Word study Modeled writing Shared/Interactive writing Guided writing Independent writing During your observations and walkthrough, what components of balanced literacy have you observed? Ask about each component. If they noted what they saw, probe by saying, Tell me more about that or can you provide an example. How might you modify a component of balanced literacy? **Implementation Methods** What resources, training, or additional support do you believe you might need to fully implement the balanced literacy program with fidelity? What would you like to add regarding teachers' motivation, support staff personnel's motivation, challenges, or recommendations for the implementation of balanced literacy program with fidelity or the way in which it was designed? On a scale of 1 to 10, how would you rate your implementation support of the balanced literacy curriculum as it was originally designed in the classroom? Please explain your rating. What other strategies besides balanced literacy do you use to blend with the balanced literacy approach, if any? Please explain. **Enabling Contexts** What resources did you utilize and promote prior, during, and after balanced literacy training? Describe how you have been prepared to support teachers' in delivering balanced literacy in the classroom. Describe your confidence in implementing balanced literacy after training such as professional development and observation occurred. What barriers to implementation did you face in relation to resources? What got in the way? What changes could be made so that the barriers could be minimized or eliminated? **Intended Outcomes** Describe your teaching beliefs/style and how it relates or differ from the balanced literacy philosophy. What role do teachers' and support staff personnel's beliefs and attitudes play in student outcomes?

Research Question	Interview question
	• What factors of the balanced literacy program do you think contribute to student achievement and outcomes?
	• Does balanced literacy achieve the student outcomes desired? Why or why not? Please describe in detail.

Note. FOI = fidelity of implementation; BL = balanced literacy; ELA = English language arts.

Systems for Keeping Track of Data

Participants' data are kept confidential as all identifiable information was removed and the interviews were numbered and coded to match each participant. Data are kept secured in a password protected computer and locked file cabinet in my home office. I am the only one with data access. Based on Walden University guidelines, I will retain all data for at least 5 years. After the 5 years' time, I will responsibly destroy the data using means such as demagnetizing and shredding.

Role of the Researcher

My role as the researcher included being an observer-participant during the video conference semistructured interviews with elementary ELA teachers and support staff personnel. In qualitative studies, such as basic qualitative research studies, researchers are the key data collection instrument and their knowledge, behavior, and experience are relevant in relation to the study's success (Maxwell, 2013; Patton, 2002). I directly contacted participants as I recruited them to participate in the study. I conducted video conference interviews with participants, as well as member checks by e-mail with participants. My role also included transcribing, coding, analyzing, and interpreting the interview data.

Currently, I teach fifth grade in Cityside School District. I excluded personal and professional coworkers, associates, and family members from participating in the study, which prevented any perceived participation pressure. In addition, I did not have any power over potential participants, thus, there was no apparent conflict of interest in this study. I gave each participant an Amazon gift card before they take part in the interviews, which seemed reasonable to thank participants for their time and for taking part in the study. Therefore, possible participants could voluntarily participate in my study without feeling obligated or coerced to participate to get a gift card at the end.

It is important that researchers can continuously reflect on the research process as they are carrying out the study and challenge their own perceptions and influence, which relates to reflexivity (Marshall et al., 2010). Reflexivity refers to the researcher's "critical self-reflection on the ways in which the researcher's social background, personality, and personal assumptions, position, and behavior can impact on the research process, particularly the collection and analysis of the data" (Marshall et al., 2010, p. 21). Hence, I was mindful of biases, experiences, and values pertaining to the research topic. I did not have any bias against the ELA teachers and support staff personnel who participated in my study. I considered all participants' perspectives and treated them respectfully. After I have completed the study and it has been approved, I will give participants and district leaders a white paper and an executive summary or potential PD materials that may be used to support the perceived needs identified by the participants.

Data Analysis Methods

I transcribed the interviews and managed the data with the NVivo data management tool. NVivo is a software program that can be used by researchers to organize data. (King, 2004; Zamawe, 2015). Thus, during the data analysis process, the researcher can use NVivo to organize the data and help make sense of them (King, 2004; Zamawe, 2015). In addition, NVivo can be used to investigate examine associations between themes and find important text sections and index them by attaching labels (King, 2004). NVivo can be used to present result in various ways, such as word tree and mind maps (Spencer et al., 2003).

To analyze the data, Moustakas's (1994) modified van Kaam method of analysis was used. This analysis method involves the following seven steps:

1. Listing and preliminary grouping.

2. Reduction and elimination.

3. Clustering and thematizing the invariant constituents.

4. Final identification of the invariant constituents and themes by application.

5. Using the relevant, validated invariant constituents and themes, construct for each co-researcher an individual textual description of the experience.

6. Construct for each co-researcher an individual structural description of the experience based on the individual textural description and imaginative variation.

7. Construct for each research participant a textural-structural description of the meanings and essences of the experience. From the individual textural-

structured descriptions, develop a composite description of the meanings and

essences of the experience, representing the group as a whole. (Moustakas,

1994, pp. 120-121)

Therefore, after each interview was completed, I transcribed the audio recording

verbatim. I verified each transcript for accuracy by reading and rereading it while

listening to the recording. The transcripts were then imported as source files into NVivo

12 computer-assisted qualitative data analysis software. Moustakas's (1994) modified

van Kaam method of analysis was used to analyze the data. I analyzed the data based on

two research questions. In the first step of the analysis, the data were horizontalized,

meaning that all statements relevant to describing participants' experiences were listed

and treated as equally significant. In NVivo, completing Step 1 involved reading the data

in full and assigning each potentially relevant statement to a node.

The second step of the analysis involved data reduction, in which any of the

horizontalized statements that were redundant, unclear, or irrelevant to the specific

phenomenon of interest were eliminated from further analysis. After this step, a total of

212 statements from the eight teacher participants and 74 statements from the two

support staff personnel participants were retained for further analysis. In NVivo, nodes

containing eliminated data were deleted. The statements retained for further analysis

identified as the invariant constituents, meaning that they were essential to describing

participants' lived experiences of the phenomenon of interest and their relevant meaning

could be abstracted and summarized in a brief phrase. The NVivo nodes with the

invariant constituents assigned to them were labeled with brief phrases indicating the meaning of the data.

In the third step of the analysis, the invariant constituents were thematized. This process involved clustering related invariant constituents. In NVivo, nodes representing similar invariant constituents were clustered as child nodes under the same parent node. In the fourth step, the emerging themes were compared to the original data to ensure that they accurately represented the meanings of participants' responses. This step involved rereading the data assigned to each theme and invariant constituent to ensure it was appropriately placed.

Next, in the fifth step, an individual textural description was created for each participant using verbatim quotations from the data that described the participant's relevant experiences. The sixth step of the analysis involved creating a structural description for each participant by using imaginative variation to assess which parts of the textural description were essential to describing the participant's lived experience. An individual textural-structural description was created for each participant in the seventh step by combining the essential quotations with narrative descriptions that summarized participants' experiences.

The final step of the analysis involved synthesizing a composite textural-structural description of the experiences of all participants. This step was completed by selecting the most representative quotations to use as example descriptions and incorporating them into a narrative summary that indicated the experiences of the whole study sample. The composite textural-structural descriptions were identified as the themes used to address

the research questions. In the data analysis results section, I summarized the findings of the study and synthesized the findings with the conceptual framework, problem statement, purpose of the study, and literature related to the themes to provide a more in-depth understanding about the phenomenon under investigation.

Data Analysis Results

The findings reflect participants' perceptions from the in-depth, one-on-one videoconferencing semistructured interviews through Zoom regarding the FOI of a BL program in the target school district ELA classrooms. Elementary ELA teachers and support staff personnel are defined as educators; therefore, they are one population. After data analysis and review of the data, eight themes emerged from the data. During the data analysis process, four themes emerged from the data for Research Question 1 related to ELA teachers' perceptions of the FOI of a BL program in the ELA classrooms: (a) high coverage with effective interventions, (b) quality of delivery can be improved, (c) limited facilitation strategies as enabling contexts, and (d) high participant responsiveness facilitates intended outcomes. Four themes emerged for Research Question 2 related to support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms: (a) high coverage with effective interventions, (b) quality of delivery can be improved, (c) additional facilitation strategies are needed, and (d) FOI facilitates intended outcomes. Table 10 indicates the research questions and corresponding themes. Table 11 provides a sampling of a priori codes assigned to excerpts from the transcriptions. Table 12 represents the overarching view of the coding process from the research questions to a priori codes to open codes that produced the

emergent themes. This section is organized in the following subsections: Research

Question 1 themes, Research Question 2 themes, discrepant cases, evidence of quality,

limitations, summary of findings, and project deliverable.

Table 10

Research Questions and Corresponding Themes

Research question	Themes used to address research question
RQ1: What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	1. High coverage with effective interventions. 2. Quality of delivery can be improved. 3. Limited facilitation strategies as enabling contexts. 4. High participant responsiveness facilitates intended outcomes.
RQ2: What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	5. High coverage with effective interventions. 6. Quality of delivery can be improved. 7. Additional facilitation strategies are needed. 8. FOI facilitates intended outcomes.

Note. FOI = fidelity of implementation; BL = balanced literacy; ELA = English language

arts.

Table 11

Sample a Priori Coding for Participants

Participant	Sample quote	a priori code
Participant 3	I believe the purpose would be to make sure that we're meeting the needs of kids in different avenues, making sure that we are engaging with them, making sure we can hear them read, making sure that we can tap into their ability to phonetically sound the words out correctly, check on their comprehension skills, and then to see the other aspect of that would be how they can translate that into their writing.	Effective interventions
Participant 4	I think I could benefit from a refresher on balanced literacy. If there are any new strategies out there for teaching small group lessons or the word studies, it could be beneficial to my instruction . . . I think that it would be helpful for teachers if when there are updates or changes made to the literacy programs that we use, that every teacher have an opportunity to participate and get guidance within the school building.	Enabling contexts
Participant 3	At the beginning [of implementation after training], I was not confident at all. Now, after teaching it [BL] for 2 years, I feel a lot better about teaching it because I understand how the program actually works.	Enabling contexts
Participant 8	I think it does [achieve intended outcomes] because it gives the students strategies that they need to become a good writer. It gives them instruction that they need to become good readers.	Intended outcomes
Participant 2	I helped teach my teammates how to implement it into their classrooms	Implementation methods
Participant 2	It's hard for them [teachers] to be motivated because they didn't really get all of the training they need and practice it in a safe environment. So, it's really hard to get training and then say, okay, go ahead and do this with your class when you're not really confident on what you're doing, because teachers all often then resort back to what they know because they feel confident.	Implementation methods
Participant 1	I think taking a training through the district specialist, literacy specialist. And also, I like to Google, I like to look stuff up myself. So even looking up things that related to balanced literacy, like what kind of text can be used for shared writing, for interactive read aloud, pertaining to this standard. So, I think that prepared me to support teachers. So, when they say we have to teach these standards, what text can we use? Just having a list for them. I think that worked well with supporting them, and they thought that was really helpful, so they didn't have to look for it themselves.	Enabling contexts
Participant 2	Balanced literacy, definitely if implemented properly, it really gets the students where they need to go	Intended outcomes

Table 12

Research Questions to a Priori Codes to Open Codes to Themes

Research question	a priori codes	Open codes	Theme
RQ1. What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Effective intervention Implementation methods Enabling contexts Intended outcomes	BL is most often implemented in small groups. The purpose of BL is to teach all aspects of literacy through differentiated delivery. Teacher BL training enhances FOI. BL training increases teacher motivation to ensure FOI. All BL components are used.	Theme 1: High coverage with effective interventions.
RQ1. What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Implementation methods Enabling contexts	Additional facilitation strategies are needed to address high complexity. Moderate to good quality of delivery.	Theme 2: Quality of delivery can be improved.
RQ1. What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Enabling contexts	Confidence in managing high intervention complexity comes from experience. More facilitation strategies are needed.	Theme 3: Limited facilitation strategies as enabling contexts.
RQ1. What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Enabling contexts Intended outcomes	Student-centered teaching philosophy. Expectations influence student achievement. BL achieves desired student outcomes.	Theme 4: High participant responsiveness facilitates intended outcomes.
RQ2. What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Effective interventions Implementation methods Enabling contexts Intended outcomes	Supporting BL by teaching teachers. BL training is effective and motivating. All BL components are supported.	Theme 5: High coverage with effective interventions.

Research question	a priori codes	Open codes	Theme
RQ2. What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Implementation methods Enabling contexts	Additional training is needed for teachers. Observed need for more teacher motivation.	Theme 6: Quality of delivery can be improved.
RQ2. What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Enabling contexts	Assistance and resources are needed. Preparation through training to support teachers.	Theme 7: Additional facilitation strategies are needed
RQ2. What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district?	Enabling contexts Intended outcomes	Belief that students can succeed. Outcome achievement depends on FOI. Teacher and administrator attitudes have a strong influence.	Theme 8: FOI facilitates intended outcomes.

Note. FOI = fidelity of implementation; BL = balanced literacy; ELA = English language arts.

Research Question 1

The first research question was as follows: What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district? Four themes emerged to address this research question, which are as follows: (a) high coverage with effective interventions, (b) quality of delivery can be improved, (c) limited facilitation strategies as enabling contexts, and (d) high participant responsiveness facilitates intended outcomes. The themes are indicated in Table 13. This subsection is organized in the following areas: Theme 1: High coverage with effective interventions, Theme 2: Quality of delivery can be improved, Theme 3: Limited facilitation strategies as enabling contexts, and Theme 4: High participant responsiveness facilitates intended outcomes.

Table 13

RQ1 Themes

Theme	n of participants contributing to theme ($N = 8$)
Theme 1: High coverage with effective interventions.	8
Theme 2: Quality of delivery can be improved	8
Theme 3: Limited facilitation strategies as enabling contexts.	8
Theme 4: High participant responsiveness facilitates intended outcomes.	8

Note. FOI = fidelity of implementation; BL = balanced literacy; ELA = English language arts.

Theme 1: High Coverage With Effective Interventions

This theme addressed part (a) of the first research question, which referred to effective interventions. The findings were related to the adherence element *coverage (exposure or dose)* from Carroll et al.'s (2007) FOI conceptual framework. Coverage refers to how much of the intervention was administered (Carroll et al., 2007; Dusenbury et al., 2003; Mihalic, 2004). Participants stated that all components of BL were being implemented to teach all aspects of literacy. Participants further indicated that to provide some differentiated instruction for students with different needs, while also remaining within the limited time available for ELA, implementation of BL tended to be in small groups rather than whole class or individual. All seven participants who took training to implement BL reported that the training enabled them to deliver the program components more effectively and motivated them to do so.

All eight teacher participants indicated that they perceived the purpose of BL to be teaching all aspects of literacy through instruction that was differentiated to meet individual students' needs. In listing the relevant aspects of literacy, Participant 7 provided a representative response in stating that they included, "speaking, reading, writing, and listening through direct instruction [and] shared instruction." Participant 3 described the two-fold purpose of the BL program in stating that the purpose of the BL program was to use "different avenues" to provide student-centered instruction in reading, phonetics, comprehension, and other skills:

> I believe the purpose would be to make sure that we're meeting the needs of kids
> in different avenues, making sure that we are engaging with them, making sure

we can hear them read, making sure that we can tap into their ability to phonetically sound the words out correctly, check on their comprehension skills, and then to see the other aspect of that would be how they can translate that into their writing.

Achieving the BL program's two-fold purpose of providing differentiated instruction is based on students' individual needs and teaching all aspects of literacy. Seven out of eight teacher participants reported that they implemented BL primarily through small group instruction. The exception, Participant 8, was a third-grade special education teacher who, because of the nature of her focus of instruction, taught BL by rotating among special needs students during coteaching. Small group instruction was preferred to whole-class instruction because it facilitated differentiated instruction, with students typically being grouped according to shared strengths or needs. Small group instruction was preferred to individual instruction because time constraints limited teachers' ability to address students' needs on a one-to-one basis. In a representative response, Participant 5 provided a description of how small group instruction was related to whole class instruction:

In the classroom, we have whole group instruction first. That's typically a mini lesson that focuses on one specific skill or strategy. After our mini lesson is when I start to pull small groups of students, and small groups are needs based.

Seven out of eight teacher participants reported that they implemented all components of the BL program. The exception, Participant 8, stated that during coteaching, she implemented some components of the BL program, whereas the other

teacher implemented the remaining components. As an example of how the guided

reading component was implemented, Participant 10 stated, "I have the student write in

small groups based on their book that they're reading about and by doing, after they're

reading a book, they're doing a summary of the story that they are currently reading on."

Participant 4 provided an example of independent daily reading implementation in

stating, "Independent daily reading, they will have a certain amount of time to take out a

book, one on their Lexile level . . . to practice their reading." Participant 3 described how

independent writing was implemented when stating:

> We try to create a really clear-cut rubric for them so they can know which
>
> components they need to put in what area of their writing, and then just try to
>
> work on the transitional statements and words to bring it all together.
>
> Participant 6 said of interactive read-aloud, "Each kid normally in person [during

in-person learning] would have a copy of the book, and we would read and then they

would interact with it, answering questions in the text." On the other hand, Participant 8

discussed how modeled writing was implemented: "Some of my kids do have

occupational therapy, so I use the language from the occupational therapist when I am

modeling writing, and having them think about when they're writing, how they're writing

their letters." Whereas Participant 7 stated that during shared interactive writing:

> Students are allowed to share writing with one another. And so, through time,
>
> some pieces go through the whole writing process from the beginning and
>
> drafting to the very end in publishing, to times when students share what they
>
> have accomplished within the writing process.

Participant 9 said of the passages read during shared reading, "It would definitely be something that would be projected for the students so they can see it. Typically, I might read the beginning of a piece and then have them join in and read the rest." Of small group instruction, Participant 5 stated, "I do a variety of strategy groups, guided reading phonics groups, sometimes even some writing groups. But it really depends on where the child is, and what the child is working on, as to what group they're in." Participant 7 said of how word study was conducted, "It's the introduction of lessons. There is a preview of important vocabulary that students might come across, especially the introduction that will help them with their comprehension, the posting of the visualization of those key words they may see."

Seven out of eight teacher participants reported that their training was effective in enabling FOI. The exception, Participant 3, could not discuss the effectiveness of BL training because none was provided to her. In stating that training was effective, most participants added that they would like to receive more training, a finding discussed in more detail under Theme 2. In a representative response related to the efficacy of the training provided, Participant 8 stated:

> When I was trained on it [BL], I could see how the concept helps to create leveled literacy instruction, but also how it helps to make sure that kids are getting grade-level content and grade-level instruction, and that they are being able to think on higher levels, so that higher level thought process, and as well as being able to be expressive when creating written work.

Seven out of eight teachers also described BL training as motivating them to implement BL. The exception again was Participant 3, who did not receive the training and so could not discuss its effects. Most participants also reiterated that additional training would assist them in increasing the FOI of BL. Participant 9 stated that BL training was motivating because it provided an understanding of the program's effectiveness:

Did it [BL training] increase my motivation? I would have to say, yes, I guess, because the training that I did have helps me understand, and I am that type of person, I need to understand something before I can execute it. I need to understand the why and the reason behind it.

One pattern that emerged among all participants was that all BL components were used and that the purpose of BL is to teach all aspects of literacy through instruction that is differentiated according to student need. Seven out of eight teacher participants had the common idea that BL training was effective in improving their delivery of BL and in motivating them to implement BL. The eighth participant did not receive dedicated BL training. Seven out of eight teacher participants noted that BL was most often implemented through small-group instruction. The eighth participant was a third-grade special education teacher who delivered BL instruction by rotating among special needs students during coteaching.

Theme 2: Quality of Delivery Can Be Improved

This theme addressed part (b) of the first research question, which referred to implementation methods. The findings were related to the moderator *quality of delivery*

from Carroll et al.'s (2007) FOI conceptual framework. Quality of delivery refers to how appropriately the intervention is conducted for attaining its intended goals (Carroll et al., 2007). Participants shared that in relation to implementation methods that the quality of BL delivery could be improved. All eight teacher participants rated the quality of their delivery of BL in the fair-to-good range. All eight teacher participants also indicated that additional facilitation strategies would assist them in improving the quality of delivery. Specific facilitation strategies for which participants expressed a need included additional training and an assistant in the classroom.

On a scale of 1 to 10, with 10 being the highest quality of BL program delivery and 1 representing the lowest, participants rated the quality of their delivery in the range from 5 to 9, with four participants selecting a rating of 7. Significantly, all participants stated that they did not give themselves a perfect rating because they perceived themselves as having room to improve, a finding that was significant in contextualizing their perceptions that additional facilitation strategies were needed to improve quality of delivery. Participant 10, who rated her quality of delivery at a 9 out of 10, reported having room to improve: "I think I would rate myself at a 9 because I feel like I still have room to grow." In self-applying a rating of 5, the lowest rating selected, Participant 7 suggested that coverage could be improved: "The students are getting some balanced literacy, so I have to rate it over 5 because they are getting something."

All eight teacher participants reported that additional facilitation strategies would enable them to improve quality of delivery. Seven out of eight teacher participants referred specifically to additional training, through PD, as a potentially effective

facilitation strategy for improving quality of delivery. In a representative response, Participant 4 discussed a need for occasional refreshers and updates on BL through PD:

> I think I could benefit from a refresher on balanced literacy. If there are any new strategies out there for teaching small group lessons or the word studies, it could be beneficial to my instruction . . . I think that it would be helpful for teachers if when there are updates or changes made to the literacy programs that we use, that every teacher have an opportunity to participate and get guidance within the school building.

Two out of eight teacher participants described providing teachers with an assistant or coteacher as a potentially effective facilitation strategy for improving quality of delivery. In a representative response, Participant 8 stated, "I feel every teacher should have a teacher assistant or a coteacher because balanced literacy works best if there are two teachers in the room."

One commonality among all eight teacher participants related to fair-to-good self-ratings for quality of delivery. All participants indicated that they perceived themselves as having room for improvement. In discussing the facilitation strategies, they perceived as most likely to help them reach their full potential in delivering quality BL instruction, seven out of eight teacher participants cited additional training, and two out of eight teacher participants cited a need for an assistant or coteacher.

Theme 3: Limited Facilitation Strategies as Enabling Contexts

This theme addressed part (c) of the first research question, which referred to enabling contexts. The findings were related to the moderator *facilitation strategies* from

Carroll et al.'s (2007) FOI conceptual framework. Facilitation or support strategies, which include training, guidelines, manuals, and monitoring and feedback, can be used to improve and regulate the FOI by ensuring that all personnel are receiving similar support and training as the objective is that the intervention delivery is as similar as possible (Carroll et al., 2007). Findings associated with this theme indicated that the training being provided was not adequate to make teachers confident in their ability to implement BL with high fidelity, and that other facilitation strategies such as additional resources and time were needed to support a high quality of delivery. The perceived inadequacy of training was closely associated with the adherence moderator of complexity (Carroll et al., 2007), with participants stating that the training they received was too limited to acquaint them sufficiently with all components of the program and with how those components worked in conjunction with one another.

All eight teacher participants indicated that they did not receive enough training to make them confident in their ability to deliver BL with high FOI. Instead, participants reported that they struggled with implementing BL initially, and that they only gained confidence after having a year or more of experience with the program. Participant 6 expressed this perception in stating, "At the beginning [of implementation after training], I was not confident at all. Now, after teaching it [BL] for 2 years, I feel a lot better about teaching it because I understand how the program actually works." Participant 9 gave a representative response in stating that training without practice was not enough to build confidence in BL delivery:

Initially after training, I was still somewhat apprehensive about it [BL], but the longer I've been implementing it, it does [I do] feel more confident about it . . . I think the actual execution of it and it working and flowing just comes from the daily experience of doing it. So, yes, I think the training helped me to understand, okay, I should be doing writing and I should be doing phonics or skills like that, and I should have an interactive read-aloud and I should have a guided reading group. But I think [confidence came from] the actual execution of it and the improvement of it on an ongoing basis, just from the experience of doing it repeatedly and seeing what works and what doesn't work.

Seven out of eight teacher participants expressed the perception that they needed other, additional facilitation strategies to ensure a high level of fidelity and quality of delivery. Participant 9 provided discrepant data in stating, "Honestly, I don't feel like there were any barriers [to BL implementation]," a response that may appear inconsistent with this participant's responses related to the perceived inadequacy of training and the resulting need to learn BL by trial and error in the classroom. The apparent inconsistency between Participant 9's different responses emerged from the relevant question's focus on barriers related to unmet resource and material needs, rather than to barriers in general.

The most frequently cited facilitation strategy need, referenced by four out of eight teacher participants, was for more books to be provided for students. Participant 6 referenced this need specifically in relation to English as a second language (ESL) and exceptional children (EC) students, saying there was a need for:

More [books] for our ESL and EC population. These books are very high

compared to where they're reading. So, we have to do a lot of read-alouds and

modify for those kids. So, I think if they gave us lower-level books to help those

kids to learn the language and learn about the actual topics, it would help.

Two participants referred to inadequate classroom accommodations as barriers.

Participant 3 stated that a barrier occurred when they were teaching BL in a classroom

shared with another teacher:

I didn't have my own classroom for a long time . . . I didn't have a whiteboard. I

would have like mini white boards I would pass out to [students] to utilize, and

they would have that as well as their Chromebook. So, they're sitting on a carpet.

I would sit on the carpet with them sometimes. So, it was just those types of

challenges that created barriers.

Two out of eight teacher participants referred to inadequate time as a barrier. In a

representative response, Participant 7 said that the time allotted for BL instruction was

not enough to include all components every day:

You just don't have time to do everything that the curriculum has designed in it.

You have to make judgments as to what can be adjusted or modified in order for

students to gain the knowledge they need to gain through the curriculum.

All eight teacher participants reported that the training they received was not

enough to make them confident in their ability to deliver BL effectively. Participants

reported that their training was too limited to acquaint them sufficiently with all

components of the BL program, and that as a result they needed to learn about

operationalizing the program effectively through trial and error in their classrooms. Seven out of eight teacher participants indicated that they had unmet resources needs, and that potentially effective facilitation strategies would include providing more books for students, allowing more time for BL instruction, and providing adequate classroom space for BL instruction.

Theme 4: High Participant Responsiveness Facilitates Intended Outcomes

This theme addressed part (d) of the first research question, which referred to intended outcomes. The findings were related to the adherence moderator *participant responsiveness* from Carroll et al.'s (2007) FOI conceptual framework. Participant responsiveness pertains to how much participants are involved and engaged in program activities and content (Dusenbury et al., 2003). Carroll et al. (2007) noted that this element involves participants' judgments about intervention outcomes and relevance. Teacher participants stated that outcomes were met in part because students were responsive to BL. Student responsiveness, in turn, was attributed to teachers' and administrators' high expectations for students and faith in students' ability to learn, as well as to teachers' student-centered teaching philosophy.

All eight teacher participants reported that they perceived BL as achieving its intended outcome of teaching all aspects of literacy with most students. Participant 7 said of the perceived efficacy of the BL program, "It has the components that are needed for students to gain knowledge and to comprehend in with all the areas in balanced literacy, they're able to use those components in order to comprehend and achieve." Participant 3 associated the program's effectiveness with its multimodal instructional model:

You're able to tap into a lot of different types of learning styles with the balanced literacy components. I really think you could cover almost all students, your high-flyers, you could tap into a lot of different students and how they learn. So, I think it does achieve the desired results if implemented properly.

Participant 8 said of the BL program's efficacy in achieving desired outcomes, "I think it does [achieve intended outcomes] because it gives the students strategies that they need to become a good writer. It gives them instruction that they need to become good readers." Participant 6 stated, "For most students, it [the BL program] does achieve the desired effect."

All participants expressed the perception that achieving the intended outcomes of the BL program depended not only on achieving the adherence elements of FOI, but also on the moderator, participant responsiveness. Teachers further indicated that student responsiveness was strongly influenced by administrators' and teachers' expectations for students. Participant 5 stated:

I think that when the grownups in kids' lives believe that they can achieve, then they will achieve. So, I think that comes from the home grownups, but it comes just as much from teachers and administration. We have to believe that our kids can achieve, and if we believe, then they believe, sort of that trickle-down of motivation.

The other teacher participants provided similar responses. Participant 9, for example, stated, "If you believe that your students are going to do well, then they will do well if you set those expectations for them." Participant 8 said of teachers' and

administrators' beliefs and attitudes, "It plays the most important part. A student is with the school staff 7 hours a day. So, their attitude is going to play a big part in the student's belief that they can learn and achieve."

When teachers reported their personal teaching philosophies, they indicated that they had the faith in students' ability to succeed that they perceived as necessary for motivating students to meet and exceed expectations. Participant 5 referred to the belief that every child has great potential in stating:

My big teaching idea is to elevate our nation's future leaders by making sure that every student has a chance to learn and remembering that every child can learn. So balanced literacy really meshes quite well with my teaching philosophy in that it makes sure that every child has an opportunity to shine in a part of literacy.

Participant 9 expressed the philosophy that all students can learn, and that BL provides students with the tools they need to achieve literacy:

My personal philosophy is that all children can learn, and that they all learn in different ways. I can see the merit in balanced literacy and all of its different components because I think they're all vital components to helping students become literate.

All eight teacher participants agreed that the BL program achieves its intended outcomes for most students. Additionally, all eight teacher participants agreed that administrators' and teachers' belief in students' ability to succeed was essential to students' success. All teacher participants further expressed that their teaching philosophy included faith in all students' ability to learn.

Research Question 2

The second research question was as follows: What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district? Four themes emerged to address this research question, which are as follows: (a) high coverage with effective interventions, (b) quality of delivery can be improved, (c) additional facilitation strategies are needed, and (d) FOI facilitates intended outcomes. The themes are indicated in Table 14. This subsection is organized in the following areas: Theme 5: High coverage with effective interventions, Theme 6: Quality of delivery can be improved, Theme 7: Additional facilitation strategies are needed, and Theme 8: Fidelity of implementation facilitates intended outcomes.

Table 14

RQ2 Themes

Theme	*n* of participants contributing to theme (*N* = 2)
Theme 5: High coverage with effective interventions.	2
Theme 6: Quality of delivery can be improved.	2
Theme 7: Additional facilitation strategies are needed.	2
Theme 8: FOI facilitates intended outcomes.	2

Note. BL = balanced literacy; FOI = fidelity of implementation.

Theme 5: High Coverage With Effective Interventions

This theme addressed part (a) of the second research question, which referred to effective interventions. The findings were related to the adherence element *coverage (or exposure or dose)* from Carroll et al.'s (2007) FOI conceptual framework. Coverage refers to how much of the intervention was administered (Carroll et al., 2007; Dusenbury et al., 2003; Mihalic, 2004). Both support staff personnel participants indicated that they supported BL implementation by teaching teachers how to deliver it, that BL training was effective and motivating for them, and that they supported all components of BL.

Both support staff personnel participants indicated that an important part of their role was to teach teachers how to implement the BL program. Participant 2 stated, "I helped teach my teammates how to implement it into their classrooms." Participant 1 described facilitating PD for teachers:

I did a professional development with the teachers on the different components of a balanced of balanced literacy. And then we took one component at a time, you know, for them to, like, get that one, they could ask questions. I went in, modeled, and then I also went into team teach and then did walk throughs to give them feedback.

The two support staff personnel participants described BL training as effective and motivating in preparing them to implement the BL program. It was notable, however, that support staff personnel participants agreed with teachers that the training they received was inadequate to make them fully confident in their ability to implement BL. Support staff personnel also agreed with teachers that they needed experience of implementation in the classroom to bring the lessons they learned in training into focus. Whereas teacher participants supplemented their training with trial and error in the classroom, support staff personnel participants supplemented their training with their own research. Participant 2 provided a representative response:

I would say my training in college was hard because you didn't have the experience, you didn't really know what you were doing. So, they might have given you the backbone and a sense of here's what it is. But the training was much better once you started to implement it. And I think it would be helpful to really focus on one piece of it at a time within training versus throwing all the parts of balanced literacy at a teacher and asking them, here's all the pieces now make it work. I do feel like my training was more on myself researching versus someone have any answers and training me.

Like all eight teacher participants, both support staff personnel participants reported that all components of BL were being implemented. Participant 1 discussed where guided writing occurred, "That small group where the students are writing and a teacher is guiding them, you know, guiding them through the process, I say through the writing process." Participant 2 said of independent daily reading, "Getting that silent, sustained reading, or the reading and writing post-it notes about it, stopping and thinking, it really builds their vocabulary and their ability to grow as a reader, their knowledge." Participant 1 stated that in independent writing, "It could be a writing topic that the teacher gives them [students], but they have to do the writing. It's not where the teacher is doing the writing. It's almost like they're on their own doing it." Participant 2 said that in interactive read-aloud:

> Teachers get that chance to model to their students what good reading looks like. So, they're reading the text, they're stopping, they're thinking, they're talking about their questions. They're really kind of showing the kids what it looks like to be a good reader.

Of modeled writing, Participant 2 stated, "The teacher needs to do it with them to model it because the kids aren't going to just do it on their own. It's really important that they show the kids how to do it." Participant 1 stated that in shared interactive writing, "You do a small group . . . . They [students] can tell you [the teacher] how to write, they could come spell the word, have a marker, but they're interacting with the teacher during that writing time." Participant 1 said of supporting shared reading, "I would go in with the teachers and do a walk through or sit down. They would come in and watch me do the

shared reading part of balanced literacy and then just give constructive feedback and then

go." Participant 2 shared the following about the implementation of small group

instruction:

> Third grade, a lot of their small groups have been with the writing piece. They've
>
> been working with forming different parts of a paragraph or an essay. I do know
>
> [Teacher] with third, fourth, and fifth grade is just starting the LLI, which is
>
> guided reading. So, she'll use a text and work on comprehension with them
>
> throughout that text.

Both support staff personnel participants agreed with teachers that all components

of BL were being implemented, saying that they observed teachers implementing the

components and assisted teachers with feedback and modeling. Support staff personnel

also agreed with teachers that BL training was inadequate and that the program did not

make sense to them until they had experience implementing it in the classroom. Teachers

reported that they mainly learned how to implement their BL training primarily through

classroom experience, whereas support staff personnel reported that they learned about

BL implementation primarily through their own research.

Theme 6: Quality of Delivery Can Be Improved

This theme addressed part (b) of the second research question, which referred to

implementation methods. The findings were related to the moderator *quality of delivery*

from Carroll et al.'s (2007) FOI conceptual framework. Support staff personnel

participants agreed with teacher participants that more training for teachers had the

potential to improve quality of delivery. However, whereas teachers perceived training as

needed to improve quality of delivery through increased teacher comprehension of BL, support staff personnel perceived training as needed to improve quality of delivery through increased teacher motivation.

Support staff personnel participants perceived improved training involving classroom experience as necessary to enhance increase quality of delivery through increased teacher motivation. Participant 2 expressed this perception in saying of the perceived inadequacy of the current training and its relationship to teacher motivation:

It's hard for them [teachers] to be motivated because they didn't really get all of the training they need and practice it in a safe environment. So, it's really hard to get training and then say, okay, go ahead and do this with your class when you're not really confident on what you're doing, because teachers all often then resort back to what they know because they feel confident.

Participant 1 expressed that teacher motivation was essential for a high quality of delivery because teachers needed to be able to confidently model not only good reading, but a love of reading for their students. Without this modeling, Participant 1 suggested, students were unlikely to reach their full potential in BL:

I think even with teachers that are in the third through fifth grade, even administrators, they're mostly focused on, we got to make these [standardized test] scores, we got to make these scores. I think with teachers, if teachers love to read, students would love to read. To the kids, they want to please their teacher. If a teacher is not to be monotone but have excitement when they're reading.

Like teachers, support staff personnel believed that the quality of BL program implementation can be improved. In addition, like teachers, support staff personnel believed that more training for teachers has the potential to improve quality of delivery. Support staff personnel differed from teachers, however, in expressing the perception that more teacher training is needed to improve teacher motivation rather than teacher comprehension.

Theme 7: Additional Facilitation Strategies Are Needed

This theme addressed part (c) of the second research question, which referred to enabling contexts. The findings were related to the moderator *facilitation strategies* from Carroll et al.'s (2007) FOI conceptual framework. Support staff personnel participants believed they were adequately prepared through their training, independent research, and classroom experience to support teachers in implementing BL. However, both support staff personnel participants stated that they perceived a need for additional facilitation strategies to support teachers, including providing classroom assistants and additional reading materials for students.

Like teachers, support staff personnel participants believed that they were adequately prepared to do their part in BL implementation. Participant 1 provided an example of how training and independent research contributed to adequate preparation to support teachers:

> I think taking a training through the district specialist, literacy specialist. And also, I like to Google, I like to look stuff up myself. So even looking up things that related to balanced literacy, like what kind of text can be used for shared

writing, for interactive read aloud, pertaining to this standard. So, I think that prepared me to support teachers. So, when they say we have to teach these standards, what text can we use? Just having a list for them. I think that worked well with supporting them, and they thought that was really helpful, so they didn't have to look for it themselves.

Both support staff personnel participants indicated that additional facilitation strategies were needed, however, because their own support of teachers was not sufficient to ensure optimal BL implementation. Participant 2 referred to experience in a district that lacked books:

When I first started, the hardest barriers were probably materials because I worked in a district where kids didn't have books. So having a classroom library and things of that were difficult. So, it was hard to implement some of this because we simply didn't have it.

Both support staff personnel participants believed they were adequately prepared to assist teachers because of a combination of training, classroom experience, and independent research. However, support staff personnel agreed with teachers that their support was not sufficient to ensure optimal BL implementation. In addition, both support staff personnel participants agreed that teachers also needed additional resources such as books for students.

Theme 8: Fidelity of Implementation Facilitates Intended Outcomes

This theme addressed part (d) of the second research question, which referred to intended outcomes. The findings were related to the adherence moderator *participant*

responsiveness from Carroll et al.'s (2007) FOI conceptual framework. Both support staff personnel participants agreed with teachers that BL was effective in achieving its intended outcomes and that administrators' and teachers' beliefs and attitudes were critical in promoting student success. However, whereas teachers tended to deemphasize the importance of FOI in their discussions of what made the BL program effective in achieving its intended outcomes, support staff personnel emphasized teachers' FOI as an important factor.

Both support staff personnel participants diverged from teachers' responses in centering the fidelity with which teachers implemented FOI as the crucial factor that determined whether intended outcomes were achieved. Participant 1 stated of what made BL effective, "I think it depends on how much the teacher implements it with fidelity. I think if it's not implemented with fidelity, then the [student] achievement is not there." Participant 2 stated, "Balanced literacy, definitely if implemented properly, it really gets the students where they need to go." Participant 2 added of personal experience of the dependence of BL effectiveness on FOI, "When I was teaching, we used the balanced literacy, I mean it was very obviously balanced literacy format in our classroom, and the students were very successful."

Support staff personnel participants agreed with teacher participants that administrators' and teachers' attitudes influenced teacher success, but they described the influence differently. Whereas teachers stated that administrators' and teachers' faith in students' ability to achieve was a necessary condition of student success, Participant 1

stated that administrators' beliefs about students influence teacher beliefs, which in turn influence student success:

Administrator beliefs and attitude can play a role in how teachers think about students. I know sometimes we are in a meeting and the administrator says here at our school, our students can't, which makes the teachers say our students can't.

Participant 2 stated that teacher beliefs in the efficacy of the BL program rather than in students' ability to succeed influenced quality of delivery: "They [teachers] have to believe in it [BL] in order to be successful. So, I think it [teacher belief] plays a huge role. I think that they really have to understand what they're doing and believe that it works."

Both support staff personnel participants reported that their own beliefs were consistent with the beliefs they described as necessary for BL to produce its intended outcomes. Participant 1 reported having faith in students' capacity to succeed, saying, "I think our students can learn." Participant 2 reported faith in the BL program, stating, "My belief is um it supports balanced literacy. I'm a very firm believer in having all the components [of the BL program] is what you need to make a child successful."

Discrepant Cases

Discrepant cases refer to exceptions or outliers that can take many forms and thorough examination of the way they present themselves within research studies might orient researchers toward exploring different meanings that they might possibly represent (Kuzel, 1999; McPherson & Thorne, 2006; Miles & Huberman, 1994; Patton, 1990). Thus, to increase trustworthiness, qualitative researchers may include in their study

alternative explanations about why certain cases do not follow the main emerging patterns that appear in their studies (Patton, 2002). In this basic qualitative research study, one discrepant case emerged in the data analysis. I handled this discrepant case openly and honestly by discussing it in Theme 3 in the data analysis result section (see Patton, 2002). Seven out of eight teacher participants expressed the perception that they needed other, additional facilitation strategies to ensure a high level of fidelity and quality of delivery. However, Participant 9 provided discrepant data in stating, "Honestly, I don't feel like there were any barriers [to BL implementation]," a response that may appear inconsistent with this participant's responses related to the perceived inadequacy of training and the resulting need to learn BL by trial and error in the classroom. The apparent inconsistency between Participant 9's different responses emerged from the relevant question's focus on barriers related to unmet resource and material needs, rather than to barriers in general.

Evidence of Quality

Similar to other forms of research, issues of quality are a concern for qualitative practitioners and researchers (Kaminski & Pitney, 2004). Quantitative researchers focus on reliability, objectivity, and validity, whereas qualitative researchers focus on credibility, transferability, dependability, and confirmability, to ensure rigor of their findings (Anney, 2014; Guba, 1981; Schwandt et al., 2007). In this section, I describe the evidence of quality and the procedures to assure accuracy and credibility of the findings. I organized this subsection in the following areas: credibility, transferability, dependability, and confirmability.

Credibility

Credibility pertains to internal validity and relate to the confidence that researchers can have in the accuracy of the research findings (Anney, 2014; Holloway & Wheeler, 2002; Macnee & McCabe, 2008). Credibility strategies include time sampling, interview technique, structural coherence, triangulation, saturation, member checking, establishing authority of researcher, peer examination, varied and prolonged field experience, and field journal or reflexivity (Anney, 2014). In this basic qualitative research study, I established credibility through reflexivity, member checks, and saturation. Reflexivity refers to the researcher's "critical self-reflection on the ways in which the researcher's social background, personality, and personal assumptions, position, and behavior can impact on the research process, particularly the collection and analysis of the data" (Marshall et al., 2010, p. 21). Thus, I strived to be cognizant of biases, values and experiences with BL. I also used member checks where I e-mailed each participant the draft findings and ask that they review the findings for accuracy and provide any feedback. In addition, I worked to achieve data saturation and provided enough information to replicate the study.

Transferability

Transferability pertains to external validity and is the interpretive counterpart of generalizability (Anney, 2014; Bitsch, 2005; Tobin & Begley, 2004). Transferability has to do with how much the research results is applicable or can be transferred to other settings with other participants (Anney, 2014; Bitsch, 2005; Tobin & Begley, 2004). Transferability strategies include variation in participant selection, thick description, and

purposive sampling (Anney, 2014). In this basic qualitative research study, I used

purposeful sampling and thick description. Thus, I ensured transferability by using

purposeful sampling to recruit third through fifth grade ELA teachers and support staff

personnel who have knowledge and experience with the BL program implementation at

the school site. I provided rich, thick description of details in relation to the study's

methodology, context, and participants.

Dependability

Dependability pertains to reliability and focuses on the consistency or stability of

the findings (Bitsch, 2005). Dependability strategies include stepwise replication, audit

trail, code-recode strategy, triangulation, and iterator comparisons or peer examination

(Anney, 2014; Chilisa & Preece, 2005; Krefting, 1991; Schwandt et al., 2007). In this

basic qualitative research study, I established dependability using audit trail. The audit

trail strategy pertains to researchers tracking all research activities and decisions, thus,

showing how they collected, recorded, and analyzed the data (Anney, 2014; Bowen,

2009; Li, 2004). I ensured a thorough audit trail by keeping the following documents for

cross-checking the inquiry process: tape-recorded interviews, notes and transcriptions of

interviews, and member check documents from participants.

Confirmability

Confirmability pertains to objectivity and refers to the degree to which other

researchers could confirm or corroborate the results of the study (Anney, 2014; Baxter &

Eyles, 1997). Confirmability strategies include triangulation, audit trail, and reflexive

journal (Anney, 2014; Bowen, 2009; Koch, 2006; Lincoln & Guba, 1985). In this basic

qualitative research study, I established confirmability by using reflexivity and audit trail. Hence, I recorded notes before and following each interview and included by reflections experiences in relation to the content shared by participants and to the phenomenon of the fidelity of BL. I used the audit trail strategy by keeping tape-recorded interviews, notes and transcriptions of interviews, and member check documents from participants for cross-checking.

Limitations

The basic qualitative research design is useful in helping to improve educational practices, but this design has also been criticized; thus, the basic qualitative research design has both strengths and limitations (Worthington, 2013). Strengths of the basic qualitative research design include being able to obtain an in-depth understanding of effective educational processes (Merriam, 2009). In carrying out a basic qualitative research study, the researcher uses a smaller sample, however, such a situation can affect the generalization of the findings because the results do not represent the general population (Patton, 2002). The results from this basic qualitative study cannot be statistically generalized, but the results could have implications for other situations based on analytical claims. Due to a small sample size of eight third through fifth grade urban elementary school ELA teachers and two support staff personnel, in future study, researchers could use a larger sample population across school districts to get a wider understanding of ELA teachers' and school support staff personnel's perceptions about their BL implementation experiences. Researchers could also use different sampling strategies, such as purposeful random sample and maximum variation sampling.

Along with generalization difficulties, researcher's bias remains a potential threat to the quality and credibility of the study (see Maxwell, 2013; Vissak, 2010). Therefore, I ensured that the transcriptions represented participants' actual statements and were transcribed correctly. Maxwell (2013) related that researchers should not modifying the meaning of participants' statements or any data because the analysis is focused on the meanings. Any modification to the meaning can reduce the reliability, quality, and trustworthiness of the data as bias can cause researchers to apply their own meaning and ignore principles of trustworthiness (Patton, 2002). I used strategies such as reflexivity where I revealed any biases, experiences, and values that relate to the basic qualitative research study. Patton (2002) discussed the importance of qualitative researchers' using their five senses so that they can collect relevant data that can be used to answer the research questions, thus, good listening, observation and note taking skills are important along with paying close attention to details. When undertaking this basic qualitative research study, I properly transcribed participants' exact accounts, managed and organized the data with NVivo, and performed proper data analysis using Moustakas's (1994) modified van Kaam method of analysis.

Another limitation that was considered is social desirability bias as ELA teachers and support staff personnel may like to be viewed positively, thus, they may not respond to interview questions in a truthful manner. However, it was my assumption that ELA teachers and support staff personnel openly and honestly answered the interview questions by disclosing their thoughts about the questions that were asked. In addition, self-report data has limitations where participants may not fully and correctly self-

evaluate themselves; but it was assumed that participants fully and accurately self-evaluated themselves.

Summary of Findings

The local problem is that literacy in the target district elementary schools continue to rank below the state average and the FOI of BL since it was initiated in 2014 to address student literacy achievement. The low scores have caused concern for administrators in the target district elementary schools. Evidence from local school officials via annual teacher evaluations and teacher and principal communications support that FOI of the BL program is a problem. Support staff personnel, which includes administrators, want to comprehend how teachers are implementing the BL program as intended and this is the main issue that was investigated in this basic qualitative research study. This study is in line with Carroll et al.'s (2007) argument that FOI needs to be measured because by appropriately evaluating fidelity, a practical assessment can be made of how it contributes to outcome or affects performance. Carroll et al. therefore claimed that evaluation is needed to determine whether the absence of effect is a result of weak implementation or program inadequacies.

To explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design, I designed this basic qualitative research study to answer two research questions. Findings showed that although teachers indicated that BL training was effective in improving their delivery of BL and in motivating them to implement BL, additional facilitation strategies

are needed to improve the quality of delivery of BL implementation, to include additional training, an assistant or coteacher in the classroom, and more resources. Findings provide a view of BL implementation. I used the results to develop a BL PD project (see Appendix A). The findings for this study are interpreted in the context of Carroll et al.'s (2007) FOI conceptual framework, Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs, and the literature review. In the summary of findings, I discuss the findings for Research Question 1 and Research Question 2 and integrate the findings with the research literature and conceptual framework.

Research Question 1

The first research question was as follows: What are the teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district? Four themes emerged to address this research question, which are as follows: (a) high coverage with effective interventions, (b) quality of delivery can be improved, (c) limited facilitation strategies as enabling contexts, and (d) high participant responsiveness facilitates intended outcomes. This area is organized as follows: Theme 1: High coverage with effective interventions, Theme 2: Quality of delivery can be improved, Theme 3: Limited facilitation strategies as enabling contexts, and Theme 4: High participant responsiveness facilitates intended outcomes.

Theme 1: High Coverage With Effective Interventions

This theme addressed part (a) of the first research question, which referred to effective interventions. Seven out of eight teacher participants indicated that BL was most often implemented through small-group instruction. The eighth participant was a third-grade special education teacher who delivered BL instruction by rotating among special needs students during coteaching. This finding that BL was most often implemented through small-group instruction is consistent with the literature as small-group instruction, which is also called strategy groups or guided reading groups, is often referred to as the cornerstone of BL (Frey et al., 2005; NHSD, 2018; Pinnell & Fountas, 2010; Policastro, 2018; WOBOE, 2016). Small group reading instruction provides different teaching that helps students in obtaining reading proficiency (Frey et al., 2005; NHSD, 2018; Pinnell & Fountas, 2010; Policastro, 2018; WOBOE, 2016). The teacher places students who have the same reading level together so that they can read books at their instructional level (NHSD, 2018; Pinnell & Fountas, 2010; WOBOE, 2016). Although there are differences among students, the students' group reading level are similar enough, so they can be successfully instructed in a group (Pinnell & Fountas, 2010).

All participants indicating that the purpose of BL is to teach all aspects of literacy through instruction that is differentiated according to student need. This finding is consistent with the literature as Frey et al. (2005) explained that BL "focuses on reading and writing achievement that are developed through instruction and support in many environments, where teachers use different approaches that vary by teacher support and

child control levels" (Frey et al., 2005, p. 272). There are multiple approaches to teaching

reading, but instead a balanced approach to literacy development (Fitzgerald, 1999;

Policastro, 2018). There are many independent facets of literacy that must be balance at

the same time (Madda et al., 2007; Policastro, 2018). For instance, in a classroom where

the BL program is used, the teacher may be working with a small-guided reading group

and within group, could give different instruction to each student (Policastro, 2018).

Simultaneously, the teacher is closely monitoring students working independently at

literacy centers (independent or small groups) as well as monitoring students reading and

writing independently (Policastro, 2018; Policastro & McTague, 2015).

Seven out of eight teacher participants reported that BL training was effective in

improving their delivery of BL. The eighth participant did not receive dedicated BL

training. This finding may be attributed to the exposure or dose element in Carroll et al.'s

(2007) FOI conceptual framework, which pertains to the intervention quantity that the

participants received such as the number of sessions implemented, session length, and

how frequent program techniques were implemented (Carroll et al., 2007; Dusenbury et

al., 2003; Mihalic, 2004). Carroll et al. (2007) included *coverage* in the exposure and

dose element, which refers to assessing if individuals receive the benefits they are

supposed to when they participate in or receive help of an intervention. This finding may

also be attributed to Duda and Wilson's (2015) formula for success framework linked

with Fixsen et al.'s (2005) AIFs as Duda and Wilson explained that when leaders and

policymakers understand the current implementation stage of the targeted initiative, then

they are better able to manage the rollout pace and identify and use formative data for

decision-making purposes. The finding is also in line with the literature as Levin et al. (2010) explained that time for PD includes time assigned to formal workshops and PD but should also include time needed for instructional planning among teachers as well as evaluation and consultation by coaches with classroom teachers. Levin et al. related that school administrators can show genuine leadership in the reform process by finding the time to take part in teacher meetings, training, feedback, and classroom observations, and modeling good practices.

Seven out of eight teacher participants repeated the idea that BL training increased their motivation to implement BL. This finding may be interpreted in relation to the literature as Johnson et al. (2006) discussed interventionists, which pertain to factors that affect the FOI level, such as the expertise, number, and motivation of the people who carry out the intervention (Johnson et al., 2006). Protheroe (2008) explained that when the key elements of an intervention are clearly known and defined, the easier it is for the innovation to be successfully implemented.

All participants indicated that all BL components were used. This finding is consistent with Carroll et al.'s (2007) FOI conceptual framework as the researchers argued that an implication for their FOI conceptual framework is that the evaluation has to measure all the factors that affect the FOI degree, such as the sufficiency of facilitation strategies and the complexity of the intervention. The researchers also noted that the evaluation must also assess participant receptiveness or responsiveness to suggested and implemented interventions. Carroll et al. emphasized the need to identify and control for the influence of potential obstacles to implementation so that problems can be attended

to, and greater implementation is attained. Findings may also be attributed to Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs as Duda and Wilson explained that implementation teams' main role is to make sure that all components of the innovation can be used as intended and produce the intended student outcomes. The authors related that these individuals may have to think of ways to adjust the system in a manner that will improve the adoption of the innovation, such as focusing on current strengths and building implementation capacity in weaker areas.

Theme 2: Quality of Delivery Can Be Improved

This theme addressed part (b) of the first research question, which referred to implementation methods. In discussing the facilitation strategies they perceived as most likely to help them reach their full potential in delivering quality BL instruction, seven out of eight teacher participants cited additional training, and two out of eight teacher participants cited a need for an assistant or coteacher. This finding can be interpreted in relation to the literature as complexity is one factor that affect FOI (Johnson et al., 2006). Johnson et al. (2006) related that complexity refers to the intervention complexity as more complexity tends to result in lower fidelity due to the level of difficulty. In addition, this finding is consistent with the literature as a program or practice such as BL, which may be effective in certain schools may be ineffective in other schools if it is not being implemented in line with its original design (Perlman & Redding, 2011). Perlman and Redding (2011) discussed implementation gap, which occurs when the practice or program from the beginning is not applied with fidelity, or a successful implementation may dissolve with turnover and time. It is important to ensure that the main components

of a program are carried out as designed, which may include the content, basic program structure, and method of delivery (Crosse et al., 2011; Perlman & Redding, 2011).

Similarly, Fixsen et al. (2005) noted that when key elements of an intervention practice or program are clearly defined, the more smoothly the practice or program can be successfully implemented. Programs that are often implemented with fidelity include those that are put together to streamline the implementation task and programs that pair well with the target population and school site needs (O'Connell, 2007; Perlman & Redding, 2011). Failure of the school staff to have key elements in place may be due to inadequate preparation and staff training as well as the staff being unwilling to move away from comfortable programs or practices (Perlman & Redding, 2011). Therefore, when a program is selected, the staff should be prepared by being trained, given opportunities to practice, and provided with coaching as needed, for proper program implementation to take place (Guldbrandsson, 2008; Perlman & Redding, 2011; Randel et al., 2016). Perlman and Redding (2011) also highlighted the importance of continued monitoring of the program or practice to ensure that it is being implemented as designed as well as its effect on student learning, so that school personnel can modify their efforts to make the program or practice work. Perlman and Redding explained that the FOI ongoing assessment helps in figuring out whether the program implementation or the program is responsible for the issue if the anticipated positive effect does not occur.

The finding may also be interpreted based on the adherence element in Carroll et al.'s (2007) FOI conceptual framework, where adherence needs to be improved based on the teacher participants' need for additional facilitation strategies. Mihalic (2004)

discussed the importance of adherence to an intervention, which pertains to the intervention or program service being delivered as it was written or designed. According to Mihalic (2004), adherence includes delivering all essential components to the correct population; appropriately training staff; using the correct materials, protocols, and techniques; and carrying out the program service or intervention in the prescribed locations or contexts. Therefore, district leaders may need to facilitate needed changes to ensure proper implementation of the BL program as some teachers in the study noted the need for additional BL training and an assistant or coteacher.

Teacher participants' need for additional facilitation strategies may also be interpreted in relation to the quality of delivery element in Carroll et al.'s (2007) FOI conceptual framework, which pertains to how teachers, volunteers, or staff members deliver a program such as being skilled in using the methods and techniques suggested by the program, as well as preparedness, attitude, and enthusiasm (Mihalic, 2004). As a result, findings indicated that teachers need additional BL training, which would enable them to improve quality of delivery. Seven out of eight teacher participants referred specifically to additional training, through PD, as a potentially effective facilitation strategy for improving quality of delivery.

The finding is also related to the moderator *intervention complexity* from Carroll et al.'s (2007) FOI conceptual framework. Regarding intervention complexity, Carroll et al. reported that the intervention description may be simple, complex, detail, or vague. Interventions that are detailed, specific, or simple tend to be accomplished with high fidelity compared to ones that are overly complex or vague. In addition, simple

interventions are easier to achieve than ones that are multifaceted due to less response

barriers for simple models (Carroll et al., 2007; Dusenbury et al., 2003; Greenhalgh et al.,

2004). Hence, Carroll et al. noted that intervention's comprehensiveness and description

has an effect on how much the program successfully follows its specified details when

carried out. Carroll et al. revealed that a review of the literature (e.g., Greenhalgh et al.,

2004) that focused on the intricacies of an idea posed a significant obstacle to its

adoption. Therefore, district leaders in the target school district may benefit from the

findings in this basic qualitative research study, which may also prompt further study of

BL implementation by district staff.

Furthermore, Cornish et al. reported that researchers such as Carroll et al. (2007)

discuss fidelity in terms of maintaining or improving positive program results, but

Cornish et al. also noted the importance of PD, problem solving, and feedback loop in the

mentoring process. Cornish et al. related that the use of fidelity monitoring as a process

evaluation tactic may help organizations achieve high implementation fidelity levels and

enhance program outcomes. The finding may also be interpreted in relation to the

literature as Duerden and Witt (2012) discussed implementation evaluations and reported

that a lack of understanding of program integrity or the level at which a program was

carried out as originally planned, can make it difficult to suggest connections between

outcomes and programs. Therefore, by having a clear view of how sound a program was

carried out allows educators to better connect programs to outcomes that have been

observed (Dobson & Cook, 1980; Duerden & Witt, 2012; Quinn & Kim, 2017). In

addition, implementation findings allow educators to understand how their programs are

being conducted and ways in which those programs can be improved (Duerden & Witt, 2012; Rossi et al., 2004). Duerden and Witt noted that combining implementation evaluations with outcome evaluations may help with finding effective practices and programs.

All participants indicated that they perceived themselves as having room for improvement. The finding may be interpreted in the context of the moderator quality of delivery from Carroll et al.'s (2007) FOI conceptual framework, which refers to how appropriately the intervention is conducted for attaining its intended goals. Carroll et al. noted that if the intervention content is delivered poorly, then it would likely affect full implementation. Cornish et al. (2016) found that the adherence element or dimension presented challenges to some educators, such as educators being uncomfortable with some lesson plan components and then having to make modifications to fit their comfort level, perceived student needs, and school guidelines.

Theme 3: Limited Facilitation Strategies as Enabling Contexts

This theme addressed part (c) of the first research question, which referred to enabling contexts. All eight teacher participants indicated that the training they received was not enough to make them confident in their ability to deliver BL effectively. Participants reported that their training was too limited to acquaint them sufficiently with all components of the BL program, and that as a result they needed to learn about operationalizing the program effectively through trial and error in their classrooms. Findings may be interpreted in relation to the literature as Levin et al. (2010) related that there are numerous reasons that can be attributed to poor school reform implementation,

but two of the most popular are (a) failure to consider the resources that will be needed to obtain success and (b) failure to obtain the right resources at the beginning. The researchers noted that educational leaders may fail to make preparation for the time commitments of their teachers and other staff members. The researchers related that if longer instructional periods for literacy activities are needed, then teacher assignments and scheduling must be changed. Levin et al. explained that time for PD includes time assigned to formal workshops and PD but should also include time needed for instructional planning among teachers as well as evaluation and consultation by coaches with classroom teachers. However, the researchers noted that school leaders often do not make formal arrangements for these activities. Levin et al. related that school administrators can show genuine leadership in the reform process by finding the time to take part in teacher meetings, training, feedback, and classroom observations, and modeling good practices.

Furthermore, findings may be interpreted in relation to Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs. Duda and Wilson (2015) explained that it takes approximately 2 to 4 years to make an evidence-based practice, educational innovation, or program fully and successfully operational (Duda & Wilson, 2015). Duda and Wilson (2015) discussed initial implementation, where the intervention is first used by teachers and others who have just learned how to use it and who are working in school and district environments that are just learning how to support the new ways of work. The authors also discussed the need for full implementation, which relates to the skillful use of an intervention that is well integrated into the

repertoire of teachers, and routinely and effectively supported by successive building and district administrators.

Seven out of eight teacher participants indicated that they had unmet resources needs, and that potentially effective facilitation strategies would include providing more books for students, allowing more time for BL instruction, and providing adequate classroom space for BL instruction. This finding may be interpreted in relation to the literature as required materials and resources affect FOI (Johnson et al., 2006). Johnson et al. (2006) related that when new or a considerable amount of materials and resources are required, they should be easily available. Perlman and Redding (2011) discussed six action principles that are targeted at the state and district levels. First, the researchers discussed consideration being placed on possible problems with implementation when fresh or new programs are selected and then being ready to address those problems. Second, the researchers noted that for state- and district-wide program implementation, support material and comprehensive training should be provided for staff, in addition to opportunities for teachers to practice and given helpful feedback. Third, Perlman and Redding recommended "calibration checks" (p. 82) that teachers use to monitor their own implementation. Fourth, the researchers related that principals should be included in training and focus should be placed on how the program will actually look in practice, which will help principals give effective feedback and monitoring on a continuous basis. Fifth, the researchers discussed the need to develop a plan for monitoring program implementation, such as collecting data, observing the program as implemented, data analysis, and planning and addressing implementation that is off course. Sixth, Perlman

and Redding recommended that the data collected in relation to FOI should be used to identify probable causes for why programs are not performing as anticipated.

The findings may be interpreted in relation to the moderator *facilitation strategies* from Carroll et al.'s (2007) FOI conceptual framework. Facilitation or support strategies, which include training, guidelines, manuals, monitoring and feedback, incentives, and capacity building, can be used to improve and regulate FOI by ensuring that all personnel are receiving similar support and training as the objective is that the intervention delivery is as similar as possible (Carroll et al., 2007). Carroll et al. (2007) related that by doing more to assist implementation through training, feedback, and monitoring, the greater the FOI level achieved. When it comes to multifaceted interventions, which may be complex and vulnerable to variations in their implementation, it is important that to use strategies in enhancing fidelity and regulating what is being implemented (Medical Research Council, 2000).

Theme 4: High Participant Responsiveness Facilitates Intended Outcomes

This theme addressed part (d) of the first research question, which referred to intended outcomes. All teacher participants expressed that their teaching philosophy included faith in all students' ability to learn. Teacher participants' teaching philosophy and faith in students' ability to learn may be interpreted in relation to perceived and actual effectiveness (credibility), which is one factor that affects FOI (Johnson et al., 2006). Perceived and actual effectiveness (credibility) pertains to teachers' belief about the approach effectiveness, such as the belief that an approach is inconsistent or ineffective with their style of teaching, thus, it will not be implemented well (Johnson et

al., 2006). Cornish et al. (2016) discussed the importance of curricula being flexible and responsive to K though 12 school system's changing demands and schedules. Educators have so far settled the debate by compromising or taking "a balanced approach to literacy instruction" (Bingham & Hall-Kenyon, 2013, p. 15; Duffy, 2001; Pressley et al., 2002; Rasinski & Padak, 2004; Snow et al., 1998; Tarat & Sucaromana, 2014). Thus, the majority of educators would recommend that teaching or literacy instruction should include the interaction between skilled-based facets of reading, such as alphabetic knowledge, phonemic awareness, and letter-sound association, as well as the meaning-based facets of reading such as comprehension and vocabulary (Bingham & Hall-Kenyon, 2013).

Furthermore, the BL approach uses authentic texts and tasks with focus on comprehension, writing, literature, and reading response as well as word identification, phonics, writing, and spelling, which makes it a challenging concept as a pedagogy for teachers new to BL instruction (Pearson, 2002; Policastro, 2018). An important component within the BL instruction is the teacher deciding each instance on the most appropriate way to continue with the instruction (Policastro, 2018; Policastro & McTague, 2015; Policastro et al., 2016). Bingham and Hall-Kenyon (2013) found that teachers' implementation of BL routines was different in relation to the grade level they instructed but was not related to years of experience or additional certifications. Furthermore, the researchers found that "teachers' participation in reading and writing routines was related to their literacy beliefs, especially their belief in the importance of code-based literacy skills" (Bingham & Hall-Kenyon, 2013, p. 14). Bingham and Hall-

Kenyon recommended the need for additional research, where researchers should focus on examining different data sources when examining teachers' implementation of the BL framework. The researchers emphasized that researchers should assess teachers' belief and self-reported practices, as well as directly evaluate practices within the classroom. Bingham and Hall-Kenyon explained that by combining observation and self-report data, researchers would be able to obtain a better understanding of how teachers are carrying out BL instruction and how their understanding and literacy beliefs may affect such practices.

All eight teacher participants agreed that administrators' and teachers' belief in students' ability to succeed was essential to students' success. The finding may be interpreted in relation to the literature as McKenna et al. (2014) noted that it is the responsibility of teachers to enhance the academic performance of all students though the use of EBPs (McKenna et al., 2014), such as the BL approach. However, McKenna et al. (2014) reported that using only EBPs does not guarantee that students will gain from these practices and increase their social, academic, and behavioral outcomes. The researchers noted that variability in implementing EBPs may negate or limit their potential benefits. The researchers related that there are four factors that may negatively affect teachers' EBP use, such as (a) the intervention or practice difficulty, (b) access to resources and materials that are needed to carry out the program, (c) practitioners may be different in the way they view the intervention's effectiveness and the intervention's actual effectiveness, and (d) the people's characteristic who are delivering the intervention, such as their skills and motivation (Johnson et al., 2006; McKenna et al.,

2014). In addition, due to the many demands on teachers' time as well as other school-based concerns, many of them require continuing support to carry out interventions as planned (McKenna et al., 2014; O'Donnell, 2008; Schulte et al., 2009). Thus, McKenna et al. noted that it is important that school professionals consider fidelity, establish to what degree EBPs are implement with fidelity, and if necessary, act to enhance classroom practices.

All eight teacher participants agreed that the BL program achieves its intended outcomes for most students. The finding is in line with the adherence moderator participant responsiveness from Carroll et al.'s (2007) FOI conceptual framework, which pertains to how much participants are involved and engaged in program activities and content (Dusenbury et al., 2003). Carroll et al. (2007) noted that this element involves participants' judgments about intervention outcomes and relevance. In regard to participant responsiveness, if participants do not believe in the importance of an intervention, then their noninvolvement may be a key cause of its low coverage or failure, which may result in low FOI (Carroll et al., 2007).

The finding may also be attributed to Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs as Duda and Wilson reported that attending to the What, Who, When, and How's of the AIFs influences the intended outcomes predictability and achievability. These pertains to having the appropriate members on the implementation team, knowing, and acting accordingly based on where the district or school is with implementing the intervention program, being knowledgeable about the implementation drivers and being supportive in order to

promote the outcome and being knowledgeable and taking part in improvement cycles (Duda & Wilson, 2015). These factors together include valuable implementation processes that will help the district or school attain its intended outcomes (Duda & Wilson, 2015). However, Duda and Wilson explained that based on the formula for success, focusing on all of these areas will only result in positive change when it occurs within an enabling context; thus, the school, district, or state must create a supportive context to achieve the intended outcome.

Research Question 2

The second research question was as follows: What are the support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design: (a) effective interventions, (b) implementation methods, (c) enabling contexts, and (d) intended outcomes in the district? Four themes emerged to address this research question, which are as follows: (a) high coverage with effective interventions, (b) quality of delivery can be improved, (c) additional facilitation strategies are needed, and (d) FOI facilitates intended outcomes. This subsection is organized in the following areas: Theme 5: High coverage with effective interventions, Theme 6: Quality of delivery can be improved, Theme 7: Additional facilitation strategies are needed, and Theme 8: Fidelity of implementation facilitates intended outcomes.

Theme 5: High Coverage With Effective Interventions

This theme addressed part (a) of the second research question, which referred to effective interventions. Findings indicted that support staff personnel agreed with

teachers that BL training was inadequate and that the program did not make sense to them until they had experience implementing it in the classroom. Teachers reported that they mainly learned how to implement their BL training primarily through classroom experience, whereas support staff personnel reported that they learned about BL implementation primarily through their own research. Both support staff personnel participants indicated that they supported BL implementation by teaching teachers how to deliver it. Findings may be interpreted in relation to the literature as Gunn (2004) reported that principals need to be knowledgeable about the adopted program or strategy, should place emphasis on observing classrooms during the first phase of implementation, and assist with fidelity without evaluation. In addition, Protheroe (2008) also suggested that principals should create opportunities for formative assessment of teachers' implementation and work with teachers so that they can establish ways to keep an eye on implementation. Protheroe also recommended periodic reviews of program implementation, such as assessing if the program or practice is being implemented as planned, whether the most important program elements are in place, and enabling staff to revise and adjust their efforts with the goal of making a program work at a particular location. Wallace et al. (2008) emphasized that principals and teachers should implement the program with high levels of fidelity, evaluate the intended outcomes, and assess how to improve the program to better meet the needs of the school while preserving and increasing the outcomes. Similarly, Gunn suggested five components that school leaders and teachers should use when preparing for and working with a new instructional approach or program: (a) learning the program; (b) staff observation of the practice in

operation; (c) teaching time where teachers become comfortable, fluent, and examine how the approach works with their students; (d) teachers being observed by other trained staff members; and (e) refinements being made based on observation feedback and team meetings or grade-level, where the practice or program and its implementation are discussed, as well as ways teachers can check or monitor their own implementation.

The result suggested that both support staff personnel participants indicated that BL training was effective and motivating for them. This finding may be interpreted in relation to the literature as Cornish et al. (2016) noted that improved PD for educators increases implementation fidelity. Levin et al. (2010) emphasized that PD time should include time assigned to formal workshops and PD as well as time needed for instructional planning among teachers as well as evaluation and consultation by coaches with classroom teachers. The researchers related that school administrators find the time to take part in teacher meetings, training, feedback, and classroom observations, and modeling good practices.

Findings indicated that support staff personnel agreed with teachers that all components of BL were being implemented, saying that they observed teachers implementing the components and assisted teachers with feedback and modeling. Both support staff personnel participants indicated that they supported all components of BL. Findings may be interpreted in relation to Carroll et al.'s (2007) FOI conceptual framework as facilitation or support strategies, such as training, guidelines, manuals, and monitoring and feedback can be used to improve and regulate FOI by ensuring that all personnel are receiving similar support and training as the objective is that the

intervention delivery is as similar as possible (Bellg et al., 2004; Carroll et al., 2007).

Findings are consistent with Duda and Wilson's (2015) formula for success framework

linked with Fixsen et al.'s (2005) AIFs as Duda and Wilson explained that

implementation teams' main role is to make sure that all components of the innovation

can be used as intended and produce the intended student outcomes.

Theme 6: Quality of Delivery Can Be Improved

This theme addressed part (b) of the second research question, which referred to

implementation methods. The finding indicated that support staff personnel participants

agreed with teacher participants that more training for teachers had the potential to

improve quality of delivery. This finding is consistent with the literature as Policastro

(2018) discussed the uncertainty of teachers and support staff personnel about the BL

framework and how it is carried out in classrooms across the school. In addition,

Leonard-Barton and Kraus (1985) related that implementation efforts may fail because

individuals undervalued the range or significance of preparation. Thus, school

instructional leaders need to be active in dealing with this issue, regardless of whether the

curriculum or program is initiated at the district-level (Protheroe, 2008), such as the BL

program. Wallace et al. (2008) found that practice or training alone was inadequate in

ensuring the accurate implementation of a program. Hence, a coaching component is

important as it helps teachers learn how to properly use new skills in the classroom

(Joyce & Showers, 2002; Protheroe, 2008).

As a result, this finding can be interpreted in relation Bartlett's (2017) study as the

researcher described how one school combined ongoing PD, administrator expectations,

and support from a coach in an effort to strengthen the use of BL practices. Bartlett found that when PD is combined with coaching it tends to be more successful in impacting teacher practice. Thus, Bartlett found that the staff felt more knowledgeable about BL as the teachers were able to try new strategies with clear understanding by all staff that these were not negotiable expectations. Bartlett made seven recommendations, which other school leaders may want to consider as they work toward implementing a literacy initiative: (a) Regional, administrator, coach, and teacher goals need to be aligned and communicated; (b) additional PD aligned with school goals combined with follow-up support from a coach must be provided; (c) PD must be linked to expectations for changes in teacher practice; (d) the role of the learning coach must be clearly defined and linked to school goals; (e) administrators and learning coaches must collaborate in their use of responsive and directive coaching methods; (f) time must be provided for teachers to implement new strategies; and (g) the principal must be supportive and knowledgeable about literacy and be willing to address school culture issues.

In addition, teacher participants' need for more training can also be attributed to Carroll et al.'s (2007) program differentiation element, which really does not measure fidelity but instead determines which elements are important for its success, which is important to evaluating new interventions. Carroll et al. related that the program differentiation should be described as the "identification of an invention's essential components" (p. 43). The researchers claimed that if the important components are the most challenging to implement, then it may help in understanding the unsuccessful intervention. Carroll et al. (2007) explained that "the provision or guidelines on how to

deliver an intervention may have a direct impact on the quality with which an intervention is actually delivered" (p. 46), which may then affect the "fidelity with which an intervention is implemented" (p. 46). Carroll et al. noted poor delivery quality if the training amount is not sufficient.

Findings indicated that teachers perceived training as needed to improve quality of delivery through increased FOI, whereas support staff personnel perceived training as needed to improve quality of delivery through increased teacher motivation. This finding may be interpreted in relation to Carroll et al.'s (2007) FOI conceptual framework as the researchers claimed that if participants are less enthusiastic about an intervention, then the intervention is less likely to be implemented completely and properly. Findings may also be attributed to Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs as Duda and Wilson discussed the need to support personnel in their use of a new program; help align programs, policies, procedures, and opportunities to ensure that new interventions have the support and buy-in to be used as intended; and acknowledge the importance of leaders and leadership styles and support current and future leaders in an organization.

Theme 7: Additional Facilitation Strategies Are Needed

This theme addressed part (c) of the second research question, which referred to enabling contexts. Both support staff personnel participants stated that they perceived a need for additional facilitation strategies to support teachers, including providing classroom assistants and additional reading materials for students. The finding may be attributed to Duda and Wilson's (2015) formula for success framework linked with

Fixsen et al.'s (2005) AIFs as Duda and Wilson explained that for change to take place at state, district, or classroom level, a plan is needed that helps staff members navigate through the implementation stages. The plan should allow teachers and administration to be engaged and supported, thus, allowing them to make effective and full use of the latest interventions in their schools (Duda & Wilson, 2015). Duda and Wilson reported that by understanding the implementation stages, intentional planning for change takes place, which results in alignment of activities to the applicable stage and increasing the likelihood of moving successfully through the stage and on to the next one, preparation for activities and challenges that will be encountered in the next stage, reduction in wasted time and resources, and increased likelihood of sustained and improved use of educational practices. The finding is consistent with the literature as Johnson et al. (2006) reported that when new or a considerable amount of materials and resources are required, they should be easily available.

The result suggested that support staff personnel participants believed they were adequately prepared through their training, independent research, and classroom experience to support teachers in implementing BL. This finding can be attributed to Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs as Duda and Wilson discussed the importance of implementation teams building on current strengths within the system such as having effective coaches, coaching support, and data collection system that is accessible as this is important at the beginning of a new initiative, applying a new policy or mandate, and throughout the process. The authors explained that implementation teams at the local level tend to

include school members, district leadership team, as well as other staff members who are authorized to make decisions. Duda and Wilson related that the team needs to focus on the alignment of all system components to ensure that the practices and program are carried out with fidelity so that all students involved fully benefit. The authors noted that linking implementation teams across the education system, such as school with district, district with regional, and regional with state, can help to close the policy and practice gap. Thus, implementation teams should function and share information in a linked manner.

In addition, the finding may be interpreted in relation to the literature as Wei et al. (2010) discussed major PD characteristics that have substantial effects on student learning and teaching practice, such as PD being intensive, maintained over time, entrenched in teachers' everyday work in schools, and associated directly with the work that teachers do with students. Wei et al. noted that PD should be engaging teachers in active learning (both learning and teaching the content); clear about district policies in relation "to curriculum, instruction, and assessment; and structured to regular engage teachers in local professional-learning communities where problems are solved through collaboration" (p. 38).

Theme 8: Fidelity of Implementation Facilitates Intended Outcomes

This theme addressed part (d) of the second research question, which referred to intended outcomes. Findings indicated that both support staff personnel participants agreed with teachers that BL was effective in achieving its intended outcomes and that administrators' and teachers' beliefs and attitudes were critical in promoting student

success. The finding that BL was effective in achieving its intended outcomes can be interpreted in relation to the literature as Lombardi and Behrman (2016) found that English learners whose eight grade reading scores projected that they would fail the high school graduation test gained or benefited from BL supplementary program during the fall of the 10th grade, therefore, their reading scores surpassed the pass mark on the high school graduation test given in the spring of Grade 11. In addition, Lombardi and Behrman found that English learners who took part in the BL "program achieved higher scores in reading on the high school graduation test than English learners who did not participate, even though their initial reading status was lower" (p. 171). Results from the researchers' study suggested that English learners in the BL intervention had the largest progress in reading of any of the four subpopulations (English learner in READ 180, English proficient in READ 180, English learner not in READ 180, and English proficient not in READ 180). Therefore, Lombardi and Behrman related that results of the study indicated that a BL intervention program benefited English learners who originally predicted failure on their high school graduation test and that a BL intervention program provided great help to English learners predicting failure on the high school graduation test than to English proficient students predicting failure. Furthermore, the finding that administrators' and teachers' beliefs and attitudes were critical in promoting student success can be interpreted in relation to the literature as Bingham and Hall-Kenyon (2013) suggested that "teachers' participation in reading and writing routines was related to their literacy beliefs" (p.14).

Findings indicated that teachers tended to deemphasize the importance of FOI in

their discussions of what made the BL program effective in achieving its intended

outcomes, whereas support staff personnel emphasized teachers' FOI as an important

factor. The finding that teachers tended to deemphasize the importance of FOI in their

discussions of what made the BL program effective in achieving its intended outcomes

may be interpreted in relation to Carroll et al.'s (2007) FOI conceptual framework.

Carroll et al. noted that participants' responsiveness may be influenced by facilitation

strategies, thus, providing incentives could make the participants and providers more

open and receptive to a new intervention. This finding can also be interpreted in relation

to the literature as researchers noted that there are barriers to FOI in the natural setting

that may result in adaptations to curricula that are unintentional and reactionary

(Bumbarger & Perkins, 2008; Cornish et al., 2016; Kelsey & Layzer, 2014).

The support staff personnel emphasis on teachers' FOI as an important factor is

consistent with Carroll et al.'s (2007) FOI conceptual framework as the authors shared

that adherence is the outcome measure of FOI. Therefore, Carroll et al. noted that fidelity

is high if an intervention that has been implemented fully follows the content, duration,

frequency, and coverage described by those who designed it. Carroll et al. shared that

measuring FOI pertains to evaluating if the implementation process result is effective

based on the intervention as planned by those who designed it. A high level of FOI or

adherence, or its important components, is not easily achieved as numerous factors may

moderate or influence the level of fidelity with which the program or intervention is

implemented (Carroll et al., 2007). As teachers and support staff personnel participants in

the basic qualitative research study indicated, additional facilitation strategies are needed

to help teachers improve the quality of delivery, such as additional training and an assistant in the classroom.

Findings indicated that support staff personnel participants agreed with teacher participants that administrators' and teachers' attitudes influenced teacher success, but they described the influence differently. Whereas teachers stated that administrators' and teachers' faith in students' ability to achieve was a necessary condition of student success, Participant 1 (support staff personnel) stated that administrators' beliefs about students influence teacher beliefs, which in turn influence student success. Findings may be interpreted in relation to the literature as Wallace et al. (2008) reported that teachers are the interventions because they are the individuals who deliver the intervention through their words and actions. Schools that have high implementation levels and high implementation uniformity among program components, showed improvements in achievements, particularly in reading and math (Aladjem & Borman, 2006; Protheroe, 2008). McKenna et al. (2014) reported that it is important that educators measure fidelity to increase instructional effectiveness as well as establish if teacher practices are positively affecting student outcomes or whether changes are needed. When educators measure fidelity, they can use the results to decide if a practice was not effective due to poor implementation or whether there was a failure to pair the intervention or practice to students' needs (Johnson et al., 2006; McKenna et al., 2014). Thus, McKenna et al. related that when measuring fidelity, educators should consider whether the absence of student response is due to inappropriately delivering the intervention or due to the inadequacy of the intervention. It is therefore challenging to determine if an intervention

or program is appropriate, without first establishing the level to which students are given lessons as it was planned (Keller-Margulis, 2012; McKenna et al., 2014).

Findings may also be attributed to Duda and Wilson's (2015) formula for success framework linked with Fixsen et al.'s (2005) AIFs as Duda and Wilson explained effective interventions alone will not solve the challenges faced by school and district leaders, teachers, and staff members (Duda & Wilson, 2015; Fixsen et al., 2010). Thus, to successfully affect student outcomes, educational policymakers should attend to and build strategies that support Duda and Wilson's formula for success. "Effective interventions, effective implementation methods, and enabling contexts" (p. 8) are all important elements and educational leaders should pay attention to the factors that influence the selection and adoption of effective interventions, the local use of effective implementation methods to appropriately implement the interventions, and the contexts within which the interventions will be applied (Duda & Wilson, 2015).

Project Deliverable

Teachers and support staff personnel participants understood the benefits of BL. Findings indicated that teachers believed that BL training increased their motivation to ensure FOI. In addition, findings indicated that support staff personnel participants believed that BL training was effective and motivating. However, both teachers and support staff personnel participants indicated that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training, an assistant or coteacher in the classroom, and more resources such as additional reading materials. Therefore, although BL has been used in Cityside School District,

ongoing student literacy problems remain. One solution might be the final project that

focused on effective or high-quality PD for ELA teachers and support staff personnel, to

provide them with possible improvements in their instructional practice and knowledge

that would result in improved fidelity and student literacy learning. As a result, I designed

a proposed BL project to address this need (see Appendix A). Therefore, I developed a 3-

day BL PD project for teachers and support staff personnel. Upon completion of this

study, I will provide district leaders and participants an executive summary and a white

paper or potential PD materials that may be used to support the identified needs perceived

by the participants.

In Section 1 of this project study, I included the local problem' rationale;

definition of terms; significance of the study; and research questions; a review of the

literature, where I address the literature search strategy, conceptual framework, and a

review of the broader problem; the implications, and a summary. In Section 2, I included

the research design and approach, participants, data collection, data analysis methods,

data analysis results, discrepant cases, evidence of data quality, limitations, summary of

findings, and a project deliverable. In Section 3, I include the rationale, review of

literature, project description, project evaluation plan, project implications, and a

summary.

Section 3: The Project

The purpose of this basic qualitative research study was to explore ELA teachers'

and support staff personnel's perceptions of the FOI of a BL program in the target school

district ELA classrooms to determine in what ways the delivery of instruction replicated

the original instructional design. Elementary ELA teachers and support staff personnel

are defined as educators; therefore, they are one population. I collected data for this study

by using in-depth, one-on-one videoconferencing semistructured interviews through

Zoom, with eight third through fifth grade urban elementary school ELA teachers and

two support staff personnel at one school district in a southeastern state. Findings

indicated that teachers and support staff participants understood the benefits of BL.

Results suggested that teachers believed that BL training increased their motivation to

ensure FOI. In addition, findings indicated that support staff participants believed that BL

training was effective and motivating.

However, both teachers and support staff participants indicated that additional

facilitation strategies are needed to improve the quality of delivery of BL

implementation, to include additional training, an assistant or coteacher in the classroom,

more resources such as additional reading materials and lower-level books for ESL and

EC population students, allowing more time for BL instruction, and providing adequate

classroom space for BL instruction. Specifically, teacher participants related that

facilitation strategies are needed to address the high complexity of implementing BL and

that additional PD training was a potentially effective facilitation strategy for improving

quality of delivery. Teacher participants reported that new strategies could be taught on

teaching small group lessons or word studies and teachers could be taught new updates or changes to the BL program. Support staff personnel reported the need for improved preparation through training to support teachers because their own support of teachers was not sufficient to ensure optimal BL implementation.

Therefore, although BL has been used in Cityside School District, ongoing student literacy problems remain. As a result of the research findings, I developed a 3-day BL PD workshop that focused on effective or high-quality PD for ELA teachers and support staff personnel. The purpose of the BL PD workshop is to develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students. In turn, the cadre of teacher teams would deliver BL training to teachers, which would provide educators with possible improvements in their instructional practice and knowledge that would result in improved fidelity and student literacy learning. In Section 3, I discuss the proposed 3-day BL PD project, including goals and the rationale for the project genre. In addition, I discuss the theories used to guide the development of the project. Furthermore, I present a scholarly review of the literature related to the project. I also include the project description, project evaluation plan, project implications, and a summary. See Appendix A for the completed 3-day BL PD project.

Description and Goals

As a result of research outcomes, I designed a 3-day BL PD workshop, titled, *Literacy – You Got This, Increasing Students' Achievement*, which focuses on effectively implementing BL in the classroom. The purpose of the BL PD is to develop cadres of

ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students. The learning outcomes will be to solidify the nine components of BL and ensure that teachers and support staff personnel know how to implement them with fidelity in the classroom. The target audience is third through fifth grade ELA teachers and support staff personnel, such as the dean of students, an academic or literacy facilitator, literacy coach, PD coach, or head of the literacy department for the district. In this section, materials, implementation, and the evaluation plan are described in this section and details are provided in Appendix A. In this section, I detail a potential BL PD and the conceptual framework highlighting Guskey's (2000) five critical levels of PD evaluation and train the trainer (TTT) model.

The main goal of the BL PD project is to develop capacity building within Cityside School District using master teachers and support staff teams. From a group of volunteers, I will select 15 teachers and support staff personnel and create five teacher cadre teams, with three educators in each team. I will develop teacher cadres who are masters in BL and who understand how to facilitate and implement interventions within the BL structure. The BL PD project includes the following goals:

- Goal 1: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will review literacy data from district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction.

- Goal 2: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity.

- Goal 3: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students.

- Goal 4: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs.

- Goal 5: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will write a lesson plan reflecting the BL components.

- Goal 6: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will model a lesson using the BL components through teacher teams.

- Goal 7: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.

Rationale

I conducted a basic qualitative research study was to explore ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Based on the findings in Section 2 of this study, I determined a 3-day BL PD project would provide ELA teachers and support staff personnel in the district with hands-on training to provide additional facilitation strategies to improve the quality of delivery of BL implementation in classrooms and schools. Therefore, the 3-day BL PD proposed in this project would present an avenue to develop capacity building within Cityside School District using master teachers and support staff teams to create five teacher cadre teams, with three educators in each team. According to Bennett (2019), using the TTT model has many advantages, including the increase of leadership capacity in schools or districts, trainers working hard to ensure that their peers are engaged, and having trainers who are already familiar with the school culture and setting. Bates and Morgan (2018) related that PD should have a positive impact on teacher knowledge and practice, as well as student learning.

In this study, teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL and that additional PD training was a potentially effective facilitation strategy for improving quality of delivery. Support staff personnel reported the need for improved preparation through training to support teachers because their own support of teachers was not sufficient to ensure optimal BL implementation. To address what ELA teachers and support staff personnel noted that

they needed, I designed the 3-day BL PD to develop teacher cadres who are masters in

BL and who understand how to facilitate and implement interventions within the BL

structure. Along with developing capacity building within Cityside School District, ELA

teachers and support staff members who volunteer to take part in the BL PD will review

literacy data from district elementary data set for third through fifth grade and identify

student skills to be prioritized for literacy instruction. PD participants will demonstrate

understanding of the nine main BL components and demonstrate how to implement them

with fidelity. In addition, PD participants will identify BL facilitation strategies to meet

the prioritized literacy skills for students and create BL coteaching lessons. Furthermore,

PD participants will write a lesson plan reflecting the BL components, model a lesson

using the BL components through teacher teams, and develop a plan for implementation

of BL using the nine components with fidelity and interventions to support diverse

learners' literacy needs.

Review of the Literature

This literature review lays the foundation for the project genre that is PD. In

addition, the literature review includes the search strategy that I used when searching for

literature related to my Section 3 conceptual framework and literature specific to the PD

topics. To provide a foundation for the 3-day BL PD project and goals, I organized the

literature review in the following areas: (a) conceptual framework, (b) exploring the

genre of effective professional development, and (c) capacity building as a tool related to

PD.

Literature Search Strategy

I performed detail searches in the research databases at Walden University Library, which included EBSCOhost databases, Teacher Reference Center, ERIC, Academic Search Complete, Education Source, PsycINFO, ProQuest Dissertations and Theses Global, and Thoreau Multi-Database Search. Additionally, I used Google Scholar to find scholarly literature. Search terms included *professional development*, *professional development and evaluation, effective professional development*, *teacher and training model*, *effective professional development and teachers and literacy*, *train the trainer model and education and teach*, and *capacity building*. I placed emphasis on finding current scholarly research articles within the last 5 years.

Conceptual Framework

Guskey's (2000) five critical levels of PD evaluation and the TTT model served as the conceptual framework for the BL PD project. Therefore, the models are used to guide the development of the BL PD project. I organized this subsection in the following areas: (a) evaluating PD and (b) TTT model.

Evaluating Professional Development

Professional developers have not given enough attention to evaluation (Guskey, 2000). Guskey (2000) related that the lack of attention to evaluation may be due to numerous factors, such as professional developers viewing evaluations as expensive and a laborious process that takes away attention from important activities related to planning, implementation, and follow-up. Guskey noted that some professional developers do not think they have the ability and knowledge to take part in detailed

evaluations. As a result, Guskey reported that that evaluation issues may be neglected, or evaluation experts may be used.

Effective evaluations involve careful planning, asking useful questions, and knowing how to find legitimate answers (Guskey, 2000). Information from effective evaluations is rigorous, consequential, and reliable, which can then be used to make careful and sensible decisions pertaining to PD processes and effects (Guskey, 2000; Guskey & Sparks, 1991). Guskey explained (a) the meaning of evaluation, (b) purposes of evaluation, (c) critical levels of PD evaluation, and (d) difference between evidence and proof.

Meaning and Purposes of Evaluation. There are different forms of evaluation (Guskey, 2000). Guskey (2000) defined evaluation as "the systematic investigation of merit or worth" (p. 41). Guskey described three main types of evaluations: (a) planning, (b) formative, and (c) summative. Guskey explained that planning evaluation occurs before an activity or program starts, however, some aspects may be recurring and ongoing. The author noted that planning evaluation is the foundation for the other evaluation activities as it helps provide a clear understanding of what should be achieved, the procedures that will be used, and how success will be established. Formative evaluation takes place during the activity or program operation (Guskey, 2000). Guskey explained that the purpose of formative evaluation is to give ongoing information to individuals responsible for the program. Information given may entail whether the program is going as planned or whether the progress that is expected is being made.

Guskey related that necessary improvements can be made based on the information given.

Summative evaluation takes place at the end of an activity or program (Guskey, 2000). Guskey (2000) reported that summative evaluation gives program developers and decision-makers information about the program's overall significance and value. Guskey argued that many educators only correlate evaluation with its summative purposes. Therefore, significant information that could assist with planning, development, and implementation is frequently ignored, although such information could be used to determine an activity or program's overall success (Guskey, 2000). As a result, Guskey pointed out that although summative evaluation is necessary, it is often done too late, which makes it unhelpful. Guskey emphasized that even though the focus on planning, formative, and summative evaluation changes through the extent of the activity or program, all three evaluations are important to meaningful evaluation.

Critical Levels of Professional Development Evaluation. With planning, formative, and summative evaluation, information is collected and analyzed (Guskey, 2000). Guskey (2000) related that there are five critical levels or stages to consider when evaluating PD. The five critical levels are ordered from simple to complex, as shown in Table 15.

Table 15

Five Critical Levels of Professional Development Evaluation

Level	Purpose	Data collection	Measured	Information used
1. Participants' reaction	Explore participants' reactions to the PD experience, such as whether participants liked the activities, did they understand the materials, and was the information helpful.	Questionnaires distributed at the end of a session or activity.	Participants' preliminary satisfaction with the PD experience.	To enhance activity or program design and delivery.
2. Participants' learning	Evaluate participants' knowledge, skills, and attitudes.	Paper and pencil assessments, demonstrations, simulations, participants' written and oral reflections, and participants' portfolios.	Participants' new knowledge and skills..	Improve how the activities and programs are designed and delivered.
3. Organization support and change	Attain information on organizational change and support.	Analysis of school and district records, examining minutes from follow-meetings, questionnaires, and structured interviews.	The organization's facilitation, accommodation, support, advocacy, and recognition of change efforts	To document and enhance organizational support as well as inform future change initiatives.
4. Participants' use of new skills and knowledge	Assess whether participants' use of their new knowledge and skills at work and evaluate whether what they learned made a difference in their professional practice.	Questionnaires, semistructured interviews with participants and supervisors, written or oral personal reflections, reviewing participants' portfolios or journals, and direct observations.	The implementation degree and quality when obtaining pertinent information at this level. Measuring if participants are properly using what they learned.	Information analysis presents evidence on current levels of use and can be beneficial when restructuring future activities and programs to enable improved and more reliable implementation.
5. Student learning outcomes	Assess the impact of the PD on student learning and whether the PD activity or program was beneficial to students.	Standardized examination scores, grades, portfolio evaluations, and assessment results. Students' self-concept assessments, study habits, school attendance, and homework completion rates.	Student learning outcomes. Cognitive, psychomotor, and affective outcomes.	To document an activity or program's overall impact and indicate where improvements need to be made in all areas of PD, which includes the program design, implementation, and follow-up.

Note. PD = professional development. From "Evaluating Professional Development," by

T. R. Guskey, 2000.

Level 1: Participants' reactions, focuses on participants' reactions to the experience (Guskey, 2000). Guskey (2000) reported that the participants' reactions level is the form of PD evaluation that educators most often use because it is simple, and this is where they have the most experience. Information for participants' reactions to the experience is the easiest to collect and analyze (Guskey, 2000). At this level, questions focus on whether participants liked the PD, did they find the activities meaningful and helpful, did they believe their time was well spent, and did they view the instructor as helpful and knowledgeable (Guskey, 2000). Questions at this level also focus on participants' basic human needs such as whether the room temperature was right, chairs were comfortable, and refreshments were delicious and fresh (Guskey, 2000). Questionnaires, which may include open-ended questions and rating-scale items, are handed out to participants at the end of activities and sessions to obtain participants' reactions (Guskey, 2000). Guskey related that the information obtained from questionnaires can be used to improve how the activities and programs are designed and delivered.

Level 2: Participants' learning, focuses on evaluating participants' knowledge, skills, and attitudes (Guskey, 2000). Guskey (2000) noted that depending on the activity or program goals, data collection tools that can be used to gather information include paper and pencil instruments, simulations, demonstrations, participant written or oral reflections, and participant portfolios. Guskey emphasized that successful learning criteria and indications should be delineated before the start of the PD experience. The author noted that the instructor should be open to the possibility of positive or negative

unintended learning. Guskey recommended preassessment and postassessment use if the instructor is concerned that participants may already have the necessary skills and knowledge. Guskey related that findings from the assessments can help the instructor improve the activities and program content, format, and organization.

Level 3: Organization support and change, focuses on organizational variables, which are instrumental to any PD effort succeeding (Guskey, 2000). On the other hand, organizational variables can impede or prevent success, even in situations where the individual aspects of PD are completed correctly (Guskey, 2000; Sparks, 1996). Therefore, Guskey emphasized that it is important to obtain information on organizational support and change. Guskey reported that questions at this level focus on organizational attributes and characteristics that are essential for success such as the change being aligned with the organization's mission. Other questions include whether change at the individual level was supported and encouraged at all levels, whether the activity or program affected organizational procedures or climate, whether administrative support was overt or public, whether problems were addressed efficiently or quickly, whether adequate resources were provided, and whether successes were shared and recognized.

Data collection at Level 3 is more complicated than Levels 1 and 2 (Guskey, 2000). Guskey (2000) explained that data collection at Level 3 may include analysis of school and district records; examining minutes from follow-up meetings; structured interviews with participants and school or district support staff personnel; and questionnaires to assess problems such as the organization's facilitation, accommodation,

support, advocacy, and recognition of change efforts. Guskey reported that the information is used to document and enhance organizational support as well as inform future change initiatives.

Level 4: Participants' use of new knowledge and skills, focuses on assessing participants' use of their new knowledge and skills at work (Guskey, 2000). Guskey (2000) noted one main question at this level, which is whether what participants learned made a difference in their professional practice. Guskey emphasized the importance of assessing the implementation degree and quality when obtaining pertinent information at this level, thus, measuring if participants are properly using what they learned. The author noted that data collection is dependent on the activity or program goals and may include questionnaires, semistructured interviews with participants and supervisors, written or oral personal reflections, reviewing participants' portfolios or journals, and direct observations. In contrast to Levels 1 and 2, data at Level 4 cannot be obtained at the end of a PD session (Guskey, 2000). Guskey reported that information should be obtained after enough time has passed to afford participants time to adapt the new practices and ideas to their setting. In addition, Guskey noted the need for measures at different time intervals due to implementation being an uneven and gradual process. Guskey related that information analysis presents evidence on current levels of use and can be beneficial when restructuring future activities and programs to enable improved and more reliable implementation.

Level 5: Student learning outcomes, focuses on the impact of the PD on student learning (Guskey, 2000). In addition, Guskey (2000) reported that the instructor also

assesses whether the PD activity or program was beneficial to students. The author noted that the outcomes are dependent on the goals of the PD effort. Guskey also explained that some unintended outcomes may be crucial; thus, various student learning measures are important at this level. The author related that data collection focuses on student achievement and performance, such as standardized examination scores, grades, portfolio evaluations, and assessment results. In addition, the author noted that psychomotor and affective outcomes may also be used, which include classroom behaviors, homework completion rates, school attendance, study habits, and students' self-concept assessments. Guskey further explained that advanced class enrollments, honor societies memberships, taking part in student-related activities, disciplinary actions, and drop-out and retention rates may be considered. Guskey related that the main source of information is student and school records. The author reported that questionnaire results from parents, administrators, students, and teachers, as well as structured interviews, may also be included. Guskey explained that the information obtained may be used to document an activity or program's overall impact and indicate where improvements need to be made in all areas of PD, which includes the program design, implementation, and follow-up.

Evaluation carried out at any of the five levels can be effectively or ineffectively completed (Guskey, 2000). Guskey (2000) related that information obtained at each of the five levels is vital and can be used to enhance PD activities and programs. However, Guskey emphasized that focusing on efficiency at one level does not provide insight about effectiveness at the next level. The author explained that success early on may be important for positive results to take place at a higher level, but it may not be enough.

Guskey reported that most PD is evaluated only at the first level or not level at all, and

for the remaining PD, most are measured at the second level. As a result, Guskey

emphasized that the importance of evaluation at each level.

Difference Between Evidence and Proof. Extensive evidence is collected when

seeking proof (Guskey, 2000). Guskey (2000) reported that it is easier to identify the kind

of evidence needed when PD instructors know in advance what they are aiming to

achieve. The author noted that when proof is absent, PD instructors can collect quality

evidence about whether the PD is impacting certain improvements in student learning.

Guskey related that valuable information can be obtained using comparison groups and

appropriate measures before and after the PD. Guskey noted the advantages of time-

series designs such as various measures that are gathered before and after execution or

implementation. In the evaluation process, Guskey emphasized the importance of

obtaining evidence on measures that are important to stakeholders. The author reported

that the evidence tends to be more exploratory than confirmatory due to the nature of

most PD efforts. Guskey related that evidence can provide crucial indications about

whether the instructor is going in the right direction or should identify other alternatives.

Train the Trainer Model

The TTT model is also referred to as triadic training, pyramidal training, and

helper model training (Suhrheinrich, 2011). Bennett (2019) compared the TTT model to

peer-to-peer instruction, which is viewed as an effective strategy. The TTT model entails

training an individual or multiple individuals who then train other individuals at the

organization (Bennett, 2019; Suhrheinrich, 2011). The TTT model is promising as it may

be cost effective, efficient, increase communication, and enhance school culture (Bennett, 2019; Suhrheinrich, 2011). The researcher related that the model is especially beneficial when the focus is on taking interventions from the research stage to the practice stage as well as providing trainees with ongoing support.

Teachers at different grade levels require continuing education to keep pace with district initiatives, educational trends, and curriculum changes (Bennett, 2019). Therefore, teacher-PD designers must think about how to motivate and engage teachers using an effective and meaningful model (Bennett, 2019). Bennett (2019) reported that the TTT model can be effectively used in PD, for example, a teacher or groups of teachers receive training and then they train fellow teachers. Bennett reported that a main advantage of the TTT model is assuring fidelity to a certain teaching strategy or program. The author explains that during PD, each trainer distributes prepared materials in the same manner. Bennet compared the trainer to a clone because the trainer does not make any changes. Due to the consistency, Bennett related that the TTT model is an exemplary for large school districts as they require training continuity to measure curriculum effectiveness between schools. The author noted that the TTT model can also be used to assist districts in meeting local, state, and federal requirements by providing a consistent professional learning process.

Trainers may use materials and methods learned from training in their own classroom or model for other teachers (Bennett, 2019). Bennett (2019) related that a trainer may provide interdisciplinary as well as cross-curricular PD for other content area teachers. Another advantage of using the TTT model include being cost effective as it is

not as expensive to send one teacher or a small teacher team to get training because they

can use the knowledge gained to teach other teachers (Bennett, 2019). In addition,

Bennett explained that the trainers can be used as experts who revisit teacher classroom

to assess training effectiveness or to model the training during the school year. Bennett

also discussed the advantage of shorter timetable for new initiatives, where a team can be

trained at the same time. The team then provide concurrent training to teachers, which

result in initiatives being put in place more quickly (Bennett, 2019). Furthermore,

Bennett discussed the advantage of using teachers who are knowledgeable about the

school culture and the school setting. Bennett explained that within in the school or

district, teachers tend to know each other personally or by reputation. Hence, the author

emphasized that when teachers are developed as trainers within schools or the district, it

creates new ways to communicate and network. Bennett also discussed how leadership

capacity increases in schools or district when teachers are trained as experts.

Despite the many advantages of the TTT model, a disadvantage is that the PD is

often scripted to serve a certain purpose or to address a certain need (Bennett, 2019).

Bennett (2019) explained the possible different needs of schools, teachers, or classrooms

in large districts and noted issues with scripted PD relevance. Specifically, Bennett

discussed the inflexibility of the model, which may not allow for variation unless trainers

are given materials that they can used to modify training for schools and classrooms.

However, even with this disadvantage, the TTT model is highly effective.

Researchers have shown that the TTT model is an effective method (Suhrheinrich,

2011; Weingarten et al., 2018). The TTT model has been shown to be effective in

different contexts, including schools, and with trainees include teachers, parents, and university students (Bennett, 2019; Suhrheinrich, 2011). Within the school setting, Weingarten et al. (2018) found that the TTT model can be used to efficiently distribute sexual violence prevention curricula, where school staff can be trained appropriately to teach this topic. Suhrheinrich (2011) examined how effective a TTT protocol was for using pivotal response training (PRT), which is a naturalistic behavior intervention that is used for children with autism. Participants included three school staff who participated as trainers, nine special education teachers, and 21 students. The researcher collected data during a baseline, treatment, and at a 3-month follow-up visit using classroom observations. During each classroom observation, the trainer observed the teacher who worked individually with each student for 10 minutes. The trainer then gave the teacher feedback for 10 minutes. Suhrheinrich videotaped each classroom observation, examined "teacher implementation of PRT, trainer assessment of PRT implementation, trainer feedback to teachers, and student behavior" (p. 3).

Findings indicated successful training completion for all three trainers (Suhrheinrich, 2011). However, results suggested that after trainers completed training, there were differences in their implementation of the procedures at their school sites (Suhrheinrich, 2011). Suhrheinrich (2011) found that six teachers learned to correctly implement all PRT components, whereas the other three teachers' progress were limited. Overall, findings indicated that participants made significant gains, which was attributed to the TTT method. However, Suhrheinrich suggested that certain adaptions to the TTT model may result in additional effectiveness. Results showed promise for the TTT model

as a sustainable and cost-effective method for enhancing the accuracy and access to teacher-implemented PRT.

The most important step when using the TTT model is selecting the trainer or trainers (Bennett, 2019). Bennett (2019) reported that the selected teachers should be well-respected, can lead teacher discussions, and are good listeners where they listen to their peers. The author related that the selected teachers should be trained to assist other teachers with connecting the training to instruction as well as demonstrating how to measure success. Bennett noted that selected teachers must have the ability to share data on student growth, which is training based. In addition, Bennett emphasized the importance of selected teachers being reflective, having the ability to accept feedback from teachers, and maintaining positive attitudes.

Before implementing the TTT model, PD designers should consider Knowles's (1980) four andragogical assumptions and how they apply in education. Trainers should be knowledgeable that adult learning is more effective when it is problem-centered instead of content-oriented (Bennett, 2019; Knowles, 1980).

Bennett (2019) discussed how Knowles's four andragogical assumptions can be applied in education:

1. Adult learners have a need to be self-directing (Knowles, 1980). Bennett (2019) explained that based on this assumption, effective instruction takes place when teachers have been included in the planning and evaluation of their PD. Bennett related that TTT models are effective when they consider teachers' requests and needs.

2. Readiness for learning increases when there is a specific need to know (Knowles, 1980). Bennett (2019) explained that similar to students, teachers learn best when the PD is pivotal to their performance.

3. Life's reservoir of experience is a primary learning resource, and the life experiences of others add enrichment to the learning process (Knowles, 1980). Bennett (2019) explained that what teachers experience, which includes the mistakes they make, is important as teachers ascribe more meaning to experience instead of passively acquired knowledge.

4. Adult learners have an inherent need for immediacy of application (Knowles, 1980). Bennett (2019) noted increased interest in teachers' learning when PD directly affects and is relevant to their jobs or personal lives.

The trainer's role when providing PD training is important. During PD, the trainer should establish and sustain a supportive climate where teacher instruction can take place (Bennett, 2019). Good practices that the trainer should use include being respectful to teachers, being enthusiastic about the training topic, using direct and clear communication, asking questions to receive feedback, and using wait time so that teachers are given the time to ask questions and allow response time (Bennett, 2019). Bennett (2019) related that using teachers as trainers in the TTT model is beneficial as it adds empathy, appreciation, and camaraderie to PD. The author noted that trainers will put in the effort to keep their peers engaged, whereas teachers may be more motivated to listen to their peers instead of consultants who are not part of the district. As Bennett

explained, using the TTT model may result in highly effective and engaging PD because it is peer led.

Effective Professional Development

Teacher professional learning is an area of high interest because it is one way to help support the complex skills that students must learn as they prepare for higher-level education and work (Darling-Hammond et al., 2017). Darling-Hammond et al. (2017) discussed the need for high teaching forms to improve students' proficiencies, such as critical thinking, complex problem-solving, effective communication and collaboration, extensive mastery of challenging information, and self-direction. To teach these skills, researchers emphasized the need for effective PD to assist teachers' learning and improve their pedagogies (Bates & Morgan, 2018; Darling-Hammond et al., 2017; Smith et al., 2020). Darling-Hammond et al. defined effective PD "as structured professional learning that results in changes to teacher knowledge and practices, and improvements in student learning outcomes" (p. 1). Many PD initiatives may not be effective in helping with changes in teacher practices and student learning (Bates & Morgan, 2018; Darling-Hammond et al., 2017). As a result, Darling-Hammond et al. reviewed 35 scholarly studies that showed a positive association between teacher PD, teaching practices, and student outcomes. The researchers conducted a meta-analysis and found seven design elements that contribute to effective PD, which are as follows: "(a) PD is content focused, (b) PD incorporates active learning, (c) PD supports collaboration, (d) PD uses models of effective practice, (e) PD provides coaching and expert support, (f) PD offers feedback and reflection, and (g) PD is of sustained duration" (Darling-Hammond et al., 2017, pp.

v-vi). The seven design elements are discussed in further detail. Darling-Hammond et al. recommended the use of all seven elements for the most effective PD.

Professional Development is Content Focused

The content-focused element centers on what is taught (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Darling-Hammond et al. (2017) related that professional learning that affects student achievement is focused on the content that is taught. The researchers noted that the content-focused element includes purposeful attention on discipline-specific curriculum creation and pedagogies in areas such as mathematics, science, and literacy. Darling-Hammond et al. explained that PD tends to take place in teachers' classrooms and is associated with school and district primary issues. Bates and Morgan (2018) related that content is the element that allows teachers to link theory to practice. However, the researchers emphasized that only concentrating on content may not result in changes to teacher instruction and student performance. Hence, Bates and Morgan explained that central to effective PD is including and focusing attention on certain strategies to teach content when working with particular student populations.

The researchers related that it is beneficial for literacy coaches to do homework and increase their learning about the content, which results in deep understanding (Bates & Morgan, 2018). Bates and Morgan (2018) noted the importance of literacy coaches reading articles that are current and continuing to take part in and teaching students as a way of diving deeper into literacy teaching and learning. The researchers suggested that coaches lead teachers in a professional book study to increase content understanding. However, Bates and Morgan related that PD coaches should find a balance between

reading about practices and seeing teaching in action through recorded or professional videos of participating teachers with their students. The researchers suggested the use of an outside expert when creating PD sessions as a way to assess that the content of each session incorporates the most updated practice and research.

Professional Development Incorporates Active Learning

The active-learning element focuses on how and what teachers learn (Bates & Morgan, 2018; Darling-Hammond et al., 2017). With active learning, emphasis is placed on models that draw teachers in the learning practices through interactive activities, artifacts, and other strategies to learning (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Bates and Morgan (2018) explained that active engagement is emphasized, which allows teacher to think about problems of practice. Bates and Morgan discuss lessons being recorded and analyzed as this helps to support teachers' active learning and pedagogical knowledge. Bates and Morgan also discuss agenda analysis, where the experiences planned for teachers are analyzed to assess where teachers actively take part in the PD session and focus is placed on implementing the ideas instead of hearing about them. The researchers noted that by assessing the active learning experiences of teachers over time, PD coaches can avoid overusing certain types of activities and provide the right teacher learning conditions.

Professional Development Supports Collaboration

The support for collaboration element focuses on the essence of collaboration and how professional learning is supported (Bates & Morgan, 2018; Darling-Hammond et al., 2017; Sims & Fletcher-Wood, 2020; Smith et al., 2020). Collaboration can take place in

small group, one-on-one, or whole-school settings (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Bates and Morgan (2018) reported that collaboration centers on togetherness and goes beyond individual classroom experiences. The researchers emphasized the need for trusting relationships as this will allow teachers to gain from collaborative efforts. Bates and Morgan pointed out that creating trusting relationships takes time, such as time to understand each other's instructional context and time to obtain data on interactions between teachers and students. The researchers related that through collaboration; a group comes up with solutions using evidence-based conversations. Bates and Morgan noted that these professional conversations result in action and debriefing, where instruction is further refined to meet student needs. The researchers explained that collaboration increases professional learning as teachers share their thoughts, take steps to understand their colleagues, and openly approach their practice with the goal of making changes.

Professional Development Uses Models of Effective Practice

In PD, using models for effective practice are beneficial in furthering teacher learning and reinforcing student achievement (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Darling-Hammond et al. (2017) reported that curricular and instructional models, along with instruction modeling, are essential to teachers as they provide teachers with a vision that they can employ for their personal learning and growth. When teachers have a vision, they have clear understanding about what they want to achieve in their classrooms, thus, setting goals to achieve their vision (Bates & Morgan, 2018). Various types of modeling include peer observations, demonstration lessons, and

curriculum materials, to include sample assessments and student work samples, video and written teaching cases, and unit plans and lessons (Bates & Morgan, 2018; Darling-Hammond et al., 2017; Doppelt et al., 2009). Bates and Morgan (2018) discussed teachers' need for guided opportunities where they can explore curriculum materials and reflect on how lessons could evolve. The researchers related that using different models help in teachers' understanding that students follow different paths, teacher expertise is instrumental, and increases their understanding of effective practice.

Professional Development Provides Coaching and Expert Support

Coaches or experts are normally educators such as instructional leaders and literacy coaches (Bates & Morgan, 2018; Darling-Hammond et al., 2017). The role that coaches play with educators, including teachers, is essential, where they use professional learning strategies, to include modeling strong instructional practices, supporting group discussion, and collaborative analysis of student work (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Additionally, Darling-Hammond et al. (2017) explained that coaches may share content and evidence-based practices as well as their expertise. Bates and Morgan (2018) related that coaches can provide teachers with individualized feedback remotely using technology or through one-on-one coaching in the classroom. The researchers noted that when coaches work with one teacher at a time, they can provide personalized feedback based on the teacher's strengths and needs. Bates and Morgan explained the importance of coaches debriefing teachers after their observations as it provides feedback for the following day. Bates and Morgan reported that coaching may take place when coaches assist teachers with implementing new curricula or tools.

Like other forms of PD, coaching should not be a one-sided interaction or a one-size-fits-all approach (Bates & Morgan, 2018; Hargreaves & Fullan, 2012). Bates and Morgan (2018) reported that personalizing and contextualizing coaching and support ensures that real problems of practice are tackled. The researchers argued that teacher buy-in occurs when questions are valued. Bates and Morgan emphasized that coaches should understand that expert role does not mean they should behave as if they know everything. Instead, the researchers explained that coaches who adopt a colearner viewpoint and who consider their role as tentative are better able to help teachers in understanding that there are many choices when making decisions.

Professional Development Offers Feedback and Reflection

Feedback and reflection are often used during coaching and mentoring but may be used in other spaces (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Darling-Hammond et al. (2017) reported that PD models that reveal enhancements in student learning often "provide built-in time for teachers to think about, receive input on, and make changes to their practice by providing intentional time for feedback and/or reflection" (p. 14). Reflection and feedback are different practices, but they both help teachers to carefully move in the direction of the expert visions of practice, which may have been taught or modeled during PD (Bates & Morgan, 2018; Darling-Hammond et al., 2017). Bates and Morgan (2018) reported that for feedback to be useful, teachers must perceive it as constructive instead of critical. Feedback should be directly associated with concrete data to make sure the attention is on enhancing practice and supporting students, with resulting goals linked to instruction (Bates & Morgan, 2018; Peterson et

al., 2009). Bates and Morgan (2018) reported that feedback also includes the way in which teachers reflect on the feedback. Bates and Morgan argued that if teachers do not take the time to think about suggestions made about practice and its meaning to their individual practice, then it is unlikely that any change will occur. The researchers emphasized that linking feedback and reflection in a mutual way can increase learning.

Professional Development is of Sustained Duration

The final element, sustained duration, focuses on the duration of effective professional learning (Bates & Morgan, 2018; Darling-Hammond et al., 2017; Sims & Fletcher-Wood, 2020; Smith et al., 2020). Darling-Hammond et al. (2017) reported that although there is no clear baseline for the duration of effective PD models, meaningful professional learning that leads to changes in practice cannot be achieved in a short workshop. Instead, researchers suggested sustained PD, where teachers are given many opportunities to take part in learning that focuses on a single set of practices or concepts, has a higher probability of transforming student learning and teaching practices (Bates & Morgan, 2018; Darling-Hammond et al., 2017). For effective PD to occur, PD should take place over time, which may be weeks, months, or years (Bates & Morgan, 2018; Darling-Hammond et al., 2017). According to Bates and Morgan (2018), it is concerning that many teachers often receive fewer than 8 hours of PD, which is a contradiction to effective models that "include time to meet and discuss content, implement ideas in the classroom, and return to share and reflect upon classroom experiences" (p. 625). Bates and Morgan related that PD that is ongoing allows teachers to take part in continuous learning cycles. With sustained professional learning, teachers can identify a real problem

of practice and work to solve it (Bates & Morgan, 2018). Bates and Morgan reported that although questions from teachers are address in some workshops, follow-up and support is normally lacking. Darling-Hammond et al. (2017) noted that teachers view PD as the most effective when opportunities are provided for hands-on training that increases their understanding of academic content, when they learn how to teach the content to their students, and when the training factored in the local context.

Capacity Building

Capacity building can be developed in school districts by using master teachers and support staff teams. Capacity building is one way to support change (Clark, 2017). Clark (2017) reported that "capacity building is a process to increase the individual and collective abilities of professional staff to continuously improve student learning" (p. 5). Fullan (2008) discussed how capacity building is important to the change progress, where people are brought together to work towards a main goal, thus, strengthening their efficacy. Clark explained that effective leaders nurture and direct other's ability through building capacity to support long-term school improvements. The researcher noted that this kind of reform starts at the building level, where individual abilities are strengthened while simultaneously the collective efficacy of the entire professional school staff is increased. Clark related that raising capacity is one main task of principal change leadership efforts.

Although there are different models of successful school leadership, effective leaders use similar values and actions (Clark, 2017). Wahlstrom et al. (2010) conducted a 6-year study that focused on identifying and understanding successful education

leadership and how such leadership enhances student learning and educational practices. Wahlstrom et al. identified and grouped effective leadership into four main categories: (a) setting directions, (b) developing people, (c) redesigning the organization, and (d) managing the instructional program. The first main category, setting directions, is related to Fullan's (2003) moral purpose. Wahlstrom et al. explained that setting directions focuses on creating a shared vision, developing group goal acceptance, establishing high performance expectations, and conveying the direction. Wahlstrom et al. related that the goal of these practices is to focus attention on the individual and shared work of staff members in the school or district.

The second main category is developing people (Wahlstrom et al., 2010). Practices in the developing people category include "providing individualized support and consideration, offering intellectual stimulation, and modeling appropriate values and practices" (Wahlstrom et al., 2010, p. 68). Wahlstrom et al. (2010) noted that the main goal of these three practices is capacity building, which includes the skills and knowledge staff members need to achieve organizational goals as well as the inclination of staff members to apply these skills and knowledge. Four practices are included in the third main category, designing the organization, which include creating collaborative cultures, rearranging the organization to encourage collaboration, creating productive relationships with families and communities, and linking the school to the wider community (Wahlstrom et al., 2010). Wahlstrom et al. explained that the intent of these four practices is to create workplace situations that will permit staff members best use their capacities and motivations. Five practices are included in the fourth main category, managing the

instructional program, which include program staffing, giving instructional support, monitoring school activity, shielding staff from work distractions, and aligning resources (Wahlstrom et al., 2010). The researchers noted that these five practices emphasize learning and teaching.

It is important to understand how principals build capacity (Clark, 2017). Clark (2017) investigated suburban elementary principals' practices and perceptions as change leaders in relation to "capacity building through the leadership categories of setting directions, developing people, redesigning the organization, and managing the instructional program and subsequently how the principals reacted to the changing environment within the reciprocal effects model" (p. 6). Clark used a descriptive case study approach, where participants included three principals, their superintendents, and one teacher. Data collection included interviews and documents. Findings indicated that capacity building is crucial to sustainable school improvement. Clark found that it is essential for principals to be collaborative and inclusive. Clark reported that even though principals are final decision-maker at times, capacity building takes place when teachers are included in the direction setting process, creating department and individual goals that are aligned with the direction, and having choice. Clark found that developing teacher leadership is an important role for principals. Clark related that it is clear that capacity building is valued when teachers are in the leadership role. Findings indicated that "principals' capacity building practices align with the reciprocal effects model as change flows back and forth evidencing a fluid model" (p. 8). Clark related that for successful capacity building, people within the organization must have the belief that they can bring

about change together. Clark noted that this type of change begins at the building level,
thus, increasing individual abilities as the collective efficacy of the entire school is also
increased.

Project Description

In this basic qualitative research study, teacher participants related that facilitation
strategies are needed to address the high complexity of implementing BL and that
additional PD training was a potentially effective facilitation strategy for improving
quality of delivery. Based on the findings from the interviews in this research study, I
developed a 3-day BL PD project, where the purpose is to develop cadres of ELA
teachers and support staff personnel who are master BL teachers who will identify BL
facilitation strategies to meet the prioritized literacy skills for students. Therefore, from a
group of volunteers, I will target master teachers and support staff personnel, and select
15 teachers and support staff personnel and create five teacher cadre teams, with three
educators in each team. I will develop teacher cadres, each composed of three educators
who are masters in BL and who understand how to facilitate and implement interventions
within the BL structure. Chai et al. (2020) reported that PD improves teachers'
knowledge and understanding about BL as well as their comprehension in daily
implementation and procedural instruction of the BL approach. Chai et al. also
recommended continuous PD.

The BL PD is divided into 3 days with a different focus and specific goals for
each day. Day 1 focuses on ELA teachers and support staff personnel reviewing literacy
data from district elementary data set for third through fifth grade and identifying student

skills to be prioritized for literacy instruction. In addition, on Day 1, PD participants will demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity. Furthermore, on Day 1, PD participants will identify BL facilitation strategies to meet the prioritized literacy skills for students.

Day 2 focuses on the main goal of the BL PD project, which is to develop capacity building within Cityside School District using master teachers and support staff teams. I will provide a PowerPoint Presentation of Fullan's (2008) six secrets of change. In addition, on Day 2, PD participants will create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs. Furthermore, on Day 2, PD participants will write a lesson plan reflecting the BL components. Day 3 focuses on PD participants modeling a lesson using the BL components through teacher teams. In addition, on Day 3, PD participants will develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs. In this section, I also discuss the needed resources, existing supports, potential barriers and solutions, proposed implementation and timeline, and roles and responsibilities of researcher and others.

Needed Resources

Appendix A includes the 3-day BL PD project resources. The resources include 21 folding chairs, seven oblong tables, and a large meeting room at the school. Five of the tables will be reserved for PD participants with three participants sitting at each table. The other two tables will be reserved for the PD moderators who will be providing the training, which will include me, if approved by the head of the literacy department for the

district. This seating arrangement takes into account safety measures by providing social distancing due the coronavirus disease (COVID-19).

Other resources include name tags, sign-in sheets, and pens. Resources will also include coffee, tea, juice, door prizes, candy for tables, post-it notes, easels for post-it notes, big charts, and markers. In addition, all PD participants will review literacy data from district elementary data set for third through fifth grade. All PD participants will receive brochures on BL, which will include details about the nine main BL components. Furthermore, resources will include PowerPoint Presentations. Resources may also include example lesson plans that I found in the literature. Technological requirements will include speakers, Internet access, projector screen, overhead projector, and a laptop. Participants will be asked to bring their laptops for research and writing of lesson plans. On each of the 3 days, exit tickets will be available for PD participants to complete as well as a daily evaluation form. On Day 3, participants will also complete overall BL PD evaluation form. The exit ticket sticky notes will be placed on a chart paper and a box will be used to collect the completed evaluation forms. Additional resources are listed in Appendix A.

Existing Supports

Cityside School District leadership implemented BL in 2014 to address the elementary student literacy issue. Therefore, some supports were already in place in the target school district, such as support from the superintendent, principals, assistant principals, ELA teachers, and support staff personnel such as the dean of students, academic or literacy facilitators, literacy coaches, PD coaches, and head of the literacy

department for the district. However, the NCDPI allowed school districts to develop their own BL practices and implementation procedures (CMS, 2018; Public Schools of Robeson County, 2018), which may result in teachers lacking sufficient knowledge to implement the BL framework with fidelity and ineffective BL implementation in their classrooms.

In this basic qualitative study, support staff personnel participants agreed with teachers that the training they received was inadequate to make them fully confident in their ability to implement BL. Support staff personnel also agreed with teachers that they needed experience of implementation in the classroom to bring the lessons they learned in training into focus. Whereas teacher participants supplemented their training with trial and error in the classroom, support staff personnel participants supplemented their training with their own research. Both teachers and support staff personnel participants indicated that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training. Therefore, support was not available on a regular or consistent basis. Hence, a PD program where capacity building is developed within Cityside School District using master teachers and support staff teams, would provide continued PD opportunities as five teacher cadre teams (three educators in each team) would be available to train and coach other ELA teachers and support staff personnel in the district on a consistent basis.

Potential Barriers and Solutions

One potential barrier to the BL PD project is the process to schedule additional training for teachers and support staff personnel when they return during the summer.

District leadership tend to plan summer trainings in advance. Therefore, to address this barrier, the BL PD program could be implemented in August 2023, to allow time to present the PD program to school and district leaders as well as recruit volunteers to take part in the PD. This would allow sufficient time to obtain approval from school and district leaders to make the BL PD part of the summer 2023 PD schedule.

A second potential barrier to the BL PD is the coronavirus disease. Depending on the school and district training guidelines, an online version of the BL PD project may be needed. Researchers have suggested five delivery modes for online PD: (a) online resources or accessible websites, (b) technology for interacting with face-to-face audiences in real time, (c) PD supported with asynchronous online discussion, (d) video conferencing, and (e) the construction and facilitation of an ongoing online community (Elliott, 2017; Little & Housand, 2011). However, if an online BL PD program had to be created, I would consider Darling-Hammond et al.'s (2017) seven design elements that contribute to effective PD. Similarly, instructional leaders have noted common qualities that are essential for effective PD to take place, which include being "ongoing, collaborative, data driven in design, interest driven in design, and interactive" (Elliott, 2017, p. 11; Lutrick & Szabo, 2012). For an online BL PD program, along with revising some PD activities, I would also have to assess whether an extension to the 3-day, 8-hour PD training each day timeline, would be needed.

Proposed Implementation and Timeline

After my study is completed and approved, I will set up a meeting with district administration, to include the superintendent, head of the literacy department for the

district, principals, assistant principals, teachers, and other support staff personnel such as the dean of students, academic or literacy facilitators, literacy coaches, and PD coaches. The proposed plan would be to obtain approval to implement the BL PD program in August 2023 as part of teachers' and support staff personnel's PD training. During the meeting, I will share the findings from the study and reasons for developing the BL PD project. At the end of my presentation, I will recommend that continued BL PD occurs on a regular basis. I will recommend that the BL PD is evaluated to assess the efficacy of the PD design with educators; therefore I will recommend both that both formative and summative evaluations are used to obtain feedback on the PD implementation. Table 16 shows the proposal for implementation of proposed goals and timeline for ELA teachers and support staff personnel who will volunteer to take part in the BL PD training to become master BL trainers.

Table 16

Proposal for Implementation of Goals and Timeline

Timeline Stage	Activities
Fall 2022	Meet with district administration, to include the superintendent, head of the literacy department for the district, principals, assistant principals, teachers, and other support staff personnel such as the dean of students, academic or literacy facilitators, literacy coaches, and PD coaches.
	During the meeting, discuss the study findings and reasons for the BL PD project development.
	Recommend that continued BL PD takes place monthly and formative and summative evaluations are used to evaluate the effectiveness of the BL PD training being implemented.
Spring 2023	Obtain approval to implement the BL PD program in August 2023 as part of teachers' and support staff personnel's PD training.
	Recruit volunteers to take part in the BL PD, where I will target master teachers and support staff personnel and select 15 teachers and support staff personnel. I will create five teacher cadre teams, with three educators in each team. I
	Email registration information to selected participants.
July 2023	Email registration information reminders to selected participants.
August 2023	Secure room and set up technological resources, presentation materials, and refreshments.
PD Day 1: August 2023	Goal 1: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will review literacy data from

Timeline Stage	Activities
	district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction.
	Goal 2: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity.
	Goal 3: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students.
PD Day 2: August 2023	Goal 4: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs.
	Goal 5: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will write a lesson plan reflecting the BL components.
PD Day 3: August 2023	Goal 6: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will model a lesson using the BL components through teacher teams.
	Goal 7: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.

Note. PD = professional development; BL = balanced literacy; ELA = English language arts.

Role and Responsibilities of Researcher and Others

Following my presentation of the BL PD project, academic leaders in the district's central office will review and decide whether to approve the BL PD project as part of the district's PD training. I will recommend that the head of the literacy department for the district be responsible for the project implementation, to include the selection of literacy and PD facilitators and coaches who will moderate the BL PD training. If approved, I can also assist with moderating the BL PD training. I will also recommend that the head of the literacy department have a training plan in place for the district in relation to when and how the five cadre training teams will provide continued BL training to other teachers and support staff personnel in the district.

Master ELA teachers and support staff personnel who volunteered, will take part in the BL PD training. They will complete exit tickets, a daily evaluation form, and an overall BL PD evaluation form. After BL PD training is complete, the five cadre training teams will provide continued BL training to other teachers and support staff personnel in the district.

Table 17

Roles and Responsibilities

Participant	Roles and responsibility

District leadership	• Review and decide BL PD project approval as part of the district's PD training.
	• Head of literacy department will be responsible for the BL PD project implementation.
	   o This includes the selection of literacy and PD facilitators and coaches who will moderate the BL PD training. If approved, I can also assist with moderating the BL PD training
	   o Having a training plan in place for the district in relation to when and how the five cadre training teams will provide continued BL training to other teachers and support staff personnel in the district.

Master ELA teachers and support staff personnel	• Participate in BL PD training. • Complete exit tickets, daily evaluation form, and an overall BL PD evaluation. • After BL PD training is complete, the five cadre training teams will provide continued BL training to other teachers and support staff personnel in the district.

Note. BL = balanced literacy; PD = professional development; ELA = English language arts.

Project Evaluation Plan

In this section, I discuss formative and summative evaluations that are used for the BL PD project deliverable. In addition, I explain the evaluation goals of the project. Furthermore, I provide a description of the key stakeholders.

Formative and Summative Evaluations

The plan for evaluating the PD project includes Guskey's (2000) formative and summative evaluations. Formative evaluation refers to continuous monitoring during the learning process to make changes early on to help improve the program (Bin Mubayrik, 2020). On the other hand, summative evaluation takes place at the end of the training program to obtain information about its effectiveness (Bin Mubayrik, 2020). Guskey (2000) discussed six formative and summative guidelines:

1. Gather and analyze evidence on participants' reactions: Using a combination of items and methods, this guideline focuses on obtaining participants' thoughts about their PD experience after structured and informal PD activities.

2. Gather and analyze evidence on participants' learning: This guideline focuses on creating specific markers of successful learning, constructing or selecting instruments or situations where the learning can be shown, and collecting the information using suitable methods.

3. Gather and analyze evidence on organization support and change: This guidance focuses on figuring out the organizational attributes and characteristics that are essential for success as well as the evidence that best exemplifies those characteristics.

4. Gather and analyze evidence on participants' use of new knowledge and skills: This guideline focuses on creating specific markers of the quality and degree of implementation. In addition, the best method for collecting the information must be determined, including when it should be collected and assessing how the information can be used to give participants beneficial feedback to guide (formative) and judge (summative) their implementation efforts.

5. Gather and analyze evidence on student learning outcomes: This guideline focuses on collecting student information that is closely associated to the activity or program's goals.

6. Prepare and present evaluation reports: This guideline focuses on creating meaningful, clear, and comprehensive reports for individuals who will use the evaluation results such as participants, program developers, decision makers, and stakeholders. Evaluations reports should be brief and thorough and should include practical recommendations for modification, revision, and further implementation.

Using Guskey's (2000) five critical levels of PD evaluation model as a framework for evaluation, I determined the type of evaluation planned for the BL PD project will be to implement Level 1: Participants' reactions and Level 2: Participants' learning evaluations. As discussed in the literature review, with Level 1: Participants' reactions, questionnaires are handed out to participants at the end of activities and sessions to obtain participants' reactions (Guskey, 2000). Each day during the PD, I will conduct a

formative evaluation in the form of a short answer exit ticket and daily evaluation form. An exit ticket is a method of assessment normally used at the end of instruction and the results may be helpful to the trainer when planning the next lesson (Akhtar & Saeed, 2020). With Level 2: Participants' learning, Guskey (2000) related that findings from the assessment can help the instructor improve the activities and program content, format, and organization. I will conduct a Level 2 summative evaluation at the end of the 3-day PD by asking participants to complete a short answer overall PD evaluation form that covers a range of topics such as questions about the setting, usefulness of the activities and information presented, and suggestions to improve the BL PD.

Justification for Using Formative and Summative Evaluations

Formative and summative evaluations are appropriate because the information provided by the exit tickets, daily evaluation, and the overall BL PD evaluation can be used by the PD instructors or moderators to determine if any changes are needed to improve the PD quality. The exit tickets and daily evaluation will provide PD instructors with feedback each day to determine if the BL PD is meeting planned project goals as designed (see Glover et al., 2019). The summative evaluation will be completed at the end of the 3-day BL PD training. Guskey (2000) emphasized the benefits of good evaluations such as providing reliable, useful, and sound information that can be used to make responsible and thoughtful decision about PD effects and processes. Guskey related that evaluation is key in making distinctions between PD that is good and rotten as well as to explaining how and why they occurred. Therefore, Guskey noted the important

summative purposes that evaluation serves along with its essential planning and formative purposes.

Evaluation Goals

Evaluation is essential to continuous program improvement (Stufflebeam & Zhang, 2017). Goldstein et al. (2019) discussed the importance of including stakeholders in the evaluation process. In the initial study, teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL in the classroom. An evaluation element with the goal of enhancing the FOI of BL in Cityside School District would increase stakeholders' knowledge of teachers' implementation of BL in their daily instruction as well as teacher and support staff personnel's needs.

Key Stakeholders

The key stakeholders for this BL PD are district ELA teachers and support staff personnel such as the dean of students, an academic or literacy facilitator, literacy coach, PD coach, or head of the literacy department for the district. All stakeholders will be requested to provide feedback on the content and design of the BL PD. I will collect daily exit tickets and a daily evaluation form each day as well as a summative evaluation after the 3-days of PD. Results of the summative evaluation will be shared with ELA teachers and support staff personnel as well as other district stakeholders such as the district superintendent, principals, and assistant principals.

Project Implications

In this section, I discuss potential social change implication. In addition, I discuss the importance of the project to local stakeholders and in the larger context. This section

is organized as follow: social change implications and importance locally and in the larger context.

Social Change Implications

Based on findings in Section 2, I created my BL PD project. In this basic qualitative research study, teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL and that additional PD training was a potentially effective facilitation strategy for improving quality of delivery. Support staff personnel reported the need for improved preparation through training to support teachers because their own support of teachers was not sufficient to ensure optimal BL implementation. I designed the PD project to develop capacity building within Cityside School District using master teachers and support staff teams. More specifically, I created the PD project to develop cadres of ELA teachers and support staff personnel who are master BL teachers who will (a) review literacy data from district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction, (b) demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity, (c) identify BL facilitation strategies to meet the prioritized literacy skills for students, (d) create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs, (e) write a lesson plan reflecting the BL components, (f) model a lesson using the BL components through teacher teams, and (g) develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.

In regard to social change implications, the main goal is to develop capacity building within Cityside School District using master teachers and support staff teams who in turn will be able to train other teachers and support staff personnel in the district on a more frequent basis. Creating teacher teams who will be able to provide training, guidance, and modeling to other teachers, may improve the FOI of the BL program and increase student literacy achievement. Consequently, students, support staff personnel, teachers, and other district stakeholders will benefit from the BL PD by gaining a deeper knowledge and understanding of how to implement BL with fidelity. Therefore, positive social change will result from the increased understanding by stakeholders of how to implement BL, and students will benefit from stakeholders' understanding and implementation of BL with fidelity by strengthening literacy instruction possibly leading to improved student performance.

Importance Locally and in the Larger Context

Both teachers and support staff personnel participants indicated that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training. Locally, a BL PD project for Cityside School District ELA teachers and support staff personnel may be an effective approach by including individually tailored professional training to strengthen the fidelity of the BL program implementation with students. Researchers have found that teacher capacity building is the most productive investment for educators in helping children to read as it far exceeds teacher experience or class size effects (Cooper, 2003; Greenwald et al., 1996).

Summary

In Section 3, I included the rationale, review of literature, project description, project evaluation plan, and project implications. In Section 4, I include the project strengths and limitations; recommendations for alternative approaches; and scholarship project development, and leadership and change. In addition, I include a reflection on the importance of the work; implications, applications, and directions for futiure research; and a conclusion.

Section 4: Reflections and Conclusions

The purpose of basic qualitative research study was to explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. I used two research questions to determine (a) teachers' perceptions of the FOI of a BL program in the ELA classrooms related to the original intended design and (b) support staff personnel's perceptions of how they have supported the FOI of the BL program in the ELA classrooms related to the original intended design. I collected data for this study by using in-depth, one-on-one video conferencing semistructured interviews through Zoom, with eight third through fifth grade urban elementary school ELA teachers and two support staff personnel at one school district in a southeastern state.

Findings indicated that teachers and support staff personnel participants understood the benefits of BL. However, both teachers and support staff personnel participants indicated that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training. Specifically, teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL and that additional PD training was a potentially effective facilitation strategy for improving quality of delivery. Support staff personnel reported the need for improved preparation through training to support teachers because their own support of teachers was not sufficient to ensure optimal BL implementation.

As a result of the research findings, I developed a 3-day BL PD workshop that focused on effective or high-quality PD for ELA teachers and support staff personnel. The purpose of the BL PD workshop is to develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students. In turn, the cadre of teacher teams would deliver BL training to teachers, which would provide educators with possible improvements in their instructional practice and knowledge that would result in improved fidelity and student literacy learning. In Section 4, I include the project strengths and limitations; recommendations for alternative approaches; and scholarship project development, and leadership and change. In addition, I include a reflection on the importance of the work; implications, applications, and directions for future research; and a conclusion.

Project Strengths and Limitations

Strengths and limitations developed from this project study. First, the *Literacy – You Got This, Increasing Students' Achievement* BL PD project was developed based on the analysis of the eight third through fifth grade urban elementary school ELA teachers and two support staff personnel interview data, which indicated a need for additional facilitation strategies to address the high complexity of implementing BL. Therefore, by using the basic qualitative research design, I was able to explore ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design and used the findings to develop the BL PD project.

Merriam (2009) explained that strengths of the basic qualitative research design include being able to obtain an in-depth understanding of effective educational processes.

A second strength of the project is that the development of the 3-day BL PD workshop, which focuses on effectively implementing BL in the classroom. This includes developing cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students. The learning outcomes will be to solidify the nine components of BL and ensure that teachers and support staff personnel know how to implement them with fidelity in the classroom. Therefore, this BL PD project will develop capacity building within Cityside School District using master teachers and support staff teams who are masters in BL and who understand how to facilitate and implement interventions within the BL structure. Hence, a PD program where capacity building is developed within Cityside School District using master teachers and support staff teams, would provide continued PD opportunities as five teacher cadre teams (three educators in each team) would be available to train and coach other ELA teachers and support staff personnel in the district on a consistent and continual basis.

A third strength of the project is the PD format used to present the 3-day BL PD. The PD format allows for participants to collaborate and will review literacy data from district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction. In addition, the PD format allows for participants to create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs. Furthermore, the PD format

allows participants to write a lesson plan reflecting the BL components, model a lesson using the BL components through teacher teams, and develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.

A fourth strength of the project is using Guskey's (2000) five critical levels of PD evaluation model as a framework for evaluation, where the type of evaluation planned for the BL PD project will be to implement Level 1: Participants' reactions and Level 2: Participants' learning evaluations. Each day during the PD, I will conduct a formative evaluation in the form of a short answer exit ticket and daily evaluation form. I will conduct a Level 2 summative evaluation at the end of the 3-day PD by asking participants to complete a short answer evaluation form that covers a range of topics such as questions about the setting, usefulness of the activities and information presented, and suggestions to improve the BL PD. The results from the exit tickets and daily evaluation form at the end of each session and the evaluation form at the end of the 3-day PD will provide real time data to the PD instructors and school administrators, which will allow them to make immediate and future modifications as needed.

One limitation of this project could be whether Cityside School district leaders decide to approve and implement the proposed BL PD project initiative. Although qualitative studies have many strengths such as eliciting deeper insights into the phenomenon being studied, Rahman (2017) reported that when compared to quantitative research, many policy makers do not give as much credibility to qualitative research. If district leaders decide not to implement the proposed BL PD training, then that could

result in ELA teachers and support staff personnel not being provided with the facilitation strategies that they need to address the high complexity of implementing BL. Therefore, if the BL PD project is not approved and implemented, the district could continue to have ELA teachers and support staff personnel experiencing the same problems with implementing BL with fidelity and students experiencing the same literacy issues, which may result in a lack of improvement for local and state literacy assessment scores.

Another limitation of this BL PD project may be the many activities along with exit tickets and evaluations that participants must complete. As a result, participants may not have a lot of down time. However, it is expected that times will be adjusted as needed to allow enough time for breaks as they take part in the BL PD training.

Recommendations for Alternative Approaches

The purpose of this basic qualitative research study was to explore ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. Both teachers and support staff personnel participants indicated that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training, an assistant or coteacher in the classroom, more resources such as additional reading materials and lower-level books for ESL and EC population students, allowing more time for BL instruction, and providing adequate classroom space for BL instruction.

As a result of the research findings, I developed a 3-day BL PD workshop that focused on effective or high-quality PD for ELA teachers and support staff personnel.

The current 3-day BL PD project focuses on developing capacity building within Cityside School District using master teachers and support staff teams, who are masters in BL and who understand how to facilitate and implement interventions within the BL structure. In turn, the master teachers and support staff teams would provide continued PD opportunities as the five teacher cadre teams (three educators in each team) would be available to train and coach other ELA teachers and support staff personnel in the district on a consistent and continual basis.

Although goals of the 3-day BL PD project includes participants writing a lesson plan reflecting the BL components and modeling a lesson using the BL components through teacher teams, an alternative approach to the proposed 3-day BL PD project is designing a curriculum plan. The curriculum plan would address many of the topics included in the 3-day BL PD outlined in Section 3 and Appendix A. Therefore, the curriculum plan would focus on improving BL implementation in the classroom with fidelity.

A second alternative approach for addressing the local problem at Cityside School District is an afterschool BL PD for ELA teachers and support staff personnel that is presented monthly instead of the 3-day BL PD where teacher cadres are developed, and the cadres would then train and coach other ELA teachers and support staff personnel in the district. A third alternative approach is monthly online BL PD to be individually completed by ELA teachers and support staff personnel, with follow-up discussions taking place at a specified PD meeting. Individual online training is an alternative for ELA teachers and support staff personnel who prefer to learn at their own pace.

Questions could be addressed with trainers and through collaboration with the team at a BL PD meeting. Fourth, an alternative approach could be the creation and use of a BL manual that focuses on proper implementation of the BL components and strategies to address the high complexity of implementing BL in the classroom. I would recommend that PD is provided to teachers and support staff personnel on the use of the manual.

In addition, I collected data for this basic qualitative research study by using in-depth, one-on-one videoconferencing semistructured interviews through Zoom. An alternative approach to address the problem is the use of a qualitative case study as I had originally designed my study. I changed my study to a basic qualitative research study after the school principal and new superintendent no longer granted cooperation for the target elementary school. The case study design has many strengths such as helping the researcher obtain a holistic and rounded view of the phenomenon being studied as many sources of evidence are used such as interviews, observations, archival records, and artifacts (Noor, 2008). Alternative research methods that could be used to address the research problem includes quantitative or mixed method designs to examine the relationship between variables.

Scholarship, Project Development and Evaluation, and Leadership and Change

I was inspired to create the 3-day BL PD workshop, *Literacy – You Got This, Increasing Students' Achievement*, based on what I learned about the processes specific to the research and development of the project. Completing the administrator leadership for teaching and learning specialization doctoral classes and prospectus requirements were the foundations guiding my basic qualitative research study. Throughout the

doctoral study research process, the dedicated support and guidance of my chair was instrumental to my successful completion of my doctoral study, which included many video conferences, detail feedback, and many resources. The timely way my chair and second committee member advised and responded was extremely beneficial to my success. I worked hard to create dedicated research and writing time, as well as improved my attention to detail throughout the research process. I also worked hard on my scholarly writing skills, which includes learning to improve my writing based on the American Psychological Association writing style and using the MEAL Plan for effectively constructing my paragraphs. I have learned to improve my critical thinking and increase my qualitative data analysis knowledge and skills, such as Moustakas's (1994) modified van Kaam method of analysis. With guidance from my chair and second committee member, I used the findings from the study to develop a 3-day BL PD project.

I understand what it means to be a scholar-practitioner who can effect positive social change. Based on what I learned from participants' perceptions, I can effect change through the development of the 3-day BL PD workshop that focuses on effective or high-quality PD for ELA teachers and support staff personnel. The main goal of the BL PD project is to develop capacity building within Cityside School District using master teachers and support staff teams. The cadre of teacher teams would deliver BL training to teachers, which would provide educators with possible improvements in their instructional practice and knowledge that would result in improved fidelity and student literacy learning. Therefore, as a scholar and educator, I was inspired by this research process to become more active in my community and my work as an elementary school

teacher. Based on the findings in my research study and the development of the 3-day BL PD, I will be able to make research-based suggestions to district leadership, ELA teachers, and support staff personnel that would better serve students' needs and provide professional support for ELA teachers and support staff personnel.

Reflection on Importance of the Work

As I reflect on the importance of the work, I am amazed at the depth of knowledge I have gained throughout this research journey. The findings from the in-depth, one-on-one video conference semistructured interviews provided great insight into elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in Cityside School District ELA classrooms. Findings indicated that both teachers and support staff personnel participants perceived that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training. In addition, teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL and that additional PD training was a potentially effective facilitation strategy for improving quality of delivery. Therefore, I designed a BL PD workshop to develop capacity building within Cityside School District using master teachers and support staff teams. In turn, the cadre of teacher teams would deliver BL training to teachers, which would provide educators with possible improvements in their instructional practice and knowledge that would result in improved fidelity and student literacy learning. I hope to assist with moderating the BL PD training, if approved by the head of the literacy department for the district as one of the literacy and PD facilitators and coaches who will moderate the BL PD training.

Implications, Applications, and Directions for Future Research

In this section, I discuss the potential impact for positive social change at the individual, family, organizational, and societal or policy levels. I also discuss recommendations for future research. This section is organized in the following subsections: implications and applications and future research.

Implications and Applications

The results of this basic qualitative research study have implications for positive social change at the individual, family, organizational, and societal or policy levels. At the organizational level and societal level, this project added to the literature by filling a gap in the education literature with respect to the FOI of a BL program in a school district's ELA classrooms and determined in what ways the delivery of instruction replicated the original instructional design based on perceptions of elementary teachers and support staff personnel. The results of this study could be used by academic leaders, school officials, support staff personnel, teachers, literacy facilitators, PD coaches, and other stakeholders to determine if the BL program is being implemented as intended in the school district and if further PD for ELA teachers and support staff personnel is needed or any other action to support the implementation of the program as designed. Thus, findings may be used to further support students' literacy learning skills and improve their academic success.

Although BL has been used in Cityside School District, ongoing student literacy problems remain. At the individual, family, organizational levels, one solution to improve student literacy might be the final BL PD project that I created, which focuses on

effective or high-quality PD for ELA teachers and support staff personnel, to provide them with possible improvements in their instructional practice and knowledge that would result in improved student literacy learning. The main goal of the BL PD project is to develop capacity building within Cityside School District using master teachers and support staff teams.

After my study is completed and approved, I will provide district leaders and participants an executive summary and a white paper or potential PD materials that may be used to support the identified needs perceived by the participants. In addition, I will set up a meeting with district administration, to include the superintendent, head of the literacy department for the district, principals, assistant principals, teachers, and other support staff personnel such as the dean of students, academic or literacy facilitators, literacy coaches, and PD coaches. The proposed plan would be to obtain approval to implement the BL PD program in August 2023 as part of teachers' and support staff personnel's PD training.

Therefore, the implications for positive social change stemming from this study at the organizational level is that there is a concrete benefit to the district leadership as the product provided may facilitate any needed changes or may prompt further study of BL implementation by district staff. Thus, findings will inform district stakeholders of the status of the BL program implementation as designed. Evaluating program integrity provides stakeholders, such as administrators, evaluators, funders, teachers, and program staff with important information (Duerden & Witt, 2012; Rossi et al., 2004). "Program outcome and implementation data allow educators to understand what happened during

program implementation and the resulting effects or outcomes" (Duerden & Witt, 2012, p. 6). In turn, Duerden and Witt (2012) reported that this knowledge increases educators understanding so they can improve future services, know their current program offerings, and better serve those that they are working to help.

Future Research

Four recommendations for future research are discussed in relation to this basic qualitative research study. First, as noted in the limitations section, due to a small sample size of eight third through fifth grade urban elementary school ELA teachers and two support staff personnel, in future research studies, researchers could use a larger sample population across school districts to get a wider understanding of ELA teachers' and school support staff personnel's perceptions about their BL implementation experiences. Researchers could also use different sampling strategies, such as purposeful random sample and maximum variation sampling.

Second, as noted in the recommendations for alternative approaches section, in future research studies, researchers could use a qualitative case study as I had originally designed my study to focus on one elementary school. I changed my study to a basic qualitative research study after the school principal and new superintendent no longer granted cooperation for the target elementary school. The case study design has many strengths such as helping the researcher obtain a holistic and rounded view of the phenomenon being studied as many sources of evidence are used such as interviews, observations, archival records, and artifacts (Noor, 2008). Third, in future research studies, researchers could use alternative research methods to address the research

problem such as a quantitative research design to examine the relationship between variables or a mixed methods study, which would provide a more in-depth understanding of the issue. Fourth, in future research studies, researchers could examine or explore the effectiveness of the proposed BL PD workshop, to include the effectiveness of the cadre of teacher teams who would deliver BL training to teachers if school district leadership approved its implementation in the school district. Conducting a BL program evaluation study would provide insight into how ELA teachers, support staff personnel, and other stakeholders perceive the program.

Conclusion

This study was undertaken to explore elementary ELA teachers' and support staff personnel's perceptions of the FOI of a BL program in the target school district ELA classrooms to determine in what ways the delivery of instruction replicated the original instructional design. The results in this study may be used as a call to action for academic leaders, school officials, support staff personnel, teachers, literacy facilitators, PD coaches, and other stakeholders, as teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL and that additional PD training was a potentially effective facilitation strategy for improving quality of delivery. In addition, support staff personnel participants reported the need for improved preparation through training to support teachers because their own support of teachers was not sufficient to ensure optimal BL implementation. These findings can be interpreted in relation to the literature as Perlman and Redding (2011) discussed implementation gap, which occurs when the practice or program from the beginning is

not applied with fidelity, or a successful implementation may dissolve with turnover and time. It is important to ensure that the main components of a program are carried out as designed, which may include the content, basic program structure, and method of delivery (Crosse et al., 2011; Perlman & Redding, 2011). Perlman and Redding highlighted the importance of continued monitoring of the program or practice to ensure that it is being implemented as designed as well as its effect on student learning, so that school personnel can modify their efforts to make the program or practice work. Perlman and Redding explained that the FOI ongoing assessment helps in figuring out whether the program implementation or the program is responsible for the issue if the anticipated positive effect does not occur.

If school district leadership approves the implementation of the BL PD project, ELA teachers and support staff personnel would receive additional support to improve the quality of delivery of BL implementation, which may improve students' literacy learning skills and academic success. Providing ELA teachers and support staff personnel with additional support by approving and implementing the 3-day BL PD project is a win-win for the entire school district, including teachers, support staff personnel, and elementary school students. In Section 4, I included the project strengths and limitations; recommendations for alternative approaches; scholarship project development, and leadership and change; reflection on the importance of the work; implications, applications, and directions for futiure research; and a conclusion.

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Appendix A: The Project

Professional Development 3-Day Training Session

for Teachers and Support Staff Personnel

Literacy – You Got This, Increasing Students' Achievement!

Table of Contents

Introduction

The purpose of the balanced literacy (BL) professional development (PD) workshop is to develop cadres of English language arts (ELA) teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students. In turn, the cadre of teacher teams would deliver BL training to teachers, which would provide educators with possible improvements in their instructional practice and knowledge that would result in improved fidelity and student literacy learning. However, both teachers and support staff personnel participants indicated that additional facilitation strategies are needed to improve the quality of delivery of BL implementation, to include additional training, an assistant or coteacher in the classroom, more resources such as additional reading materials and lower-level books for English as a second language (ESL) and exceptional children (EC) population students, allowing more time for BL instruction, and providing adequate classroom space for BL instruction.

Specifically, teacher participants related that facilitation strategies are needed to address the high complexity of implementing BL and that additional PD training was a potentially effective facilitation strategy for improving quality of delivery. Teacher participants reported that new strategies could be taught on teaching small group lessons or word studies and teachers could be taught new updates or changes to the BL program. Support staff personnel reported the need for improved preparation through training to support teachers because their own support of teachers was not sufficient to ensure optimal BL implementation. Therefore, although BL has been used in Cityside School

District, ongoing student literacy problems remain. As a result of research outcomes, I

designed a 3-day BL PD workshop, titled, *Literacy – You Got This, Increasing Students'*

Achievement, which focuses on effectively implementing BL in the classroom.

Three-Day Workshop

The purpose of the BL PD workshop is to develop cadres of ELA teachers and

support staff personnel who are master BL teachers who will identify BL facilitation

strategies to meet the prioritized literacy skills for students. In turn, the cadre of teacher

teams would deliver BL training to teachers, which would provide educators with

possible improvements in their instructional practice and knowledge that would result in

improved fidelity and student literacy learning. As a result of the research findings, I

developed a 3-day BL PD workshop that focused on effective or high-quality PD for

ELA teachers and support staff personnel. The learning outcomes are for teachers and

support staff personnel to better understand the five main BL reading components and the

four main BL writing components to improve the implementation of these components in

the classroom.

The target audience is third to fifth grade ELA teachers and support staff

personnel, such as the dean of students, academic or literacy facilitator, literacy coach,

PD coach, or head mastery literacy department for the district. According to Chai et al.

(2020), PD increases teacher's knowledge and understanding about the BL approach. I

wanted professional development that supported the balanced literacy, and the teachers'

needs, and supported teachers' progress. Literacy –You Got This, Increasing Students'

Achievement goal after successful completion of BL PD is to equip ELA teachers and

support staff personnel with addition training to increase FOI of BL in the elementary classroom. Volunteered support from support staff personnel as mentors will help to implement balance literacy effectively.

Purpose

The purpose of the *Literacy – You Got This, Increasing Students' Achievement* BL PD is to provide additional training to improve third through fifth grade ELA teachers and support staff personnel quality of delivery of BL implementation into their literacy curriculum. Teachers will be provided with a 3-day PD training for ELA teachers and support staff personnel that will help them to (a) better identify student skills to be prioritized for literacy instruction, (b) better understand the nine main BL components and demonstrate how to implement them with fidelity, (c) identify BL facilitation strategies, (d) create BL coteaching lessons, (e) write a lesson plan reflecting the BL components, (f) model a lesson using the BL components, and (g) develop a plan for implementation of BL. During their individual interviews, ELA teachers and support staff personnel shared that they needed additional and effective training on BL.

In the book, *This is Balanced Literacy, Grades K-6*, Fisher et al. (2014) reported that BL is a framework designed to help all students learn to read and write effectively. The author noted that the BL framework stands firmly on the premise that all students can learn to read and write. The 3-day BL PD project would provide ELA teachers and support staff personnel in the district with hands-on training to provide additional facilitation strategies to improve the quality of delivery of BL implementation in classrooms and schools. Therefore, the 3-day BL PD proposed in this project would

present an avenue to develop capacity building within Cityside School District using master teachers and support staff teams to create five teacher cadre teams, with three educators in each team. In turn, the cadre of teacher teams would deliver BL training to teachers, which would provide educators with possible improvements in their instructional practice and knowledge that would result in improved fidelity and student literacy learning.

Program Goals

As a result of research outcomes, I designed a 3-day BL PD workshop, titled, *Literacy – You Got This, Increasing Students' Achievement*, which focuses on effectively implementing BL in the classroom. The purpose of the BL PD is to develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students. The learning outcomes will be to solidify the nine components of BL and ensure that teachers and support staff personnel know how to implement them with fidelity in the classroom. The target audience is third through fifth grade ELA teachers and support staff personnel, such as the dean of students, an academic or literacy facilitator, literacy coach, PD coach, or head of the literacy department for the district. In this section, materials, implementation, and the evaluation plan are described in this section and details are provided in Appendix A. In this section, I detail a potential BL PD and the conceptual framework highlighting Guskey's (2000) five critical levels of PD evaluation and train the trainer (TTT) model.

The main goal of the BL PD project is to develop capacity building within Cityside School District using master teachers and support staff teams. From a group of volunteers, I will select 15 teachers and support staff personnel and create five teacher cadre teams, with three educators in each team. I will develop teacher cadres who are masters in BL and who understand how to facilitate and implement interventions within the BL structure. The BL PD project includes the following goals:

- Goal 1: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will review literacy data from district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction.

- Goal 2: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity.

- Goal 3: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students.

- Goal 4: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs.

- Goal 5: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will write a lesson plan reflecting the BL components.

- Goal 6: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will model a lesson using the BL components through teacher teams.

- Goal 7: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.

Learning Outcomes

The learning outcomes will be to solidify the nine components of BL and ensure that teachers and support staff personnel know how to implement them with fidelity in the classroom. Therefore, this BL PD project will develop capacity building within Cityside School District using master teachers and support staff teams, who are masters in BL and who understand how to facilitate and implement interventions within the BL structure. Hence, a PD program where capacity building is developed within Cityside School District using master teachers and support staff teams, would provide continued PD opportunities as five teacher cadre teams (three educators in each team) would be available to train and coach other ELA teachers and support staff personnel in the district on a consistent and continual basis.

Target Audience

The target audience is third through fifth grade ELA teachers and support staff personnel, such as the dean of students, an academic or literacy facilitator, literacy coach, PD coach, or head of the literacy department for the district. The main goal of the BL PD project is to develop capacity building within Cityside School District using master teachers and support staff teams. I will recruit volunteers through emails with the district leadership's permission and through social media such as LinkedIn and Facebook. From a group of volunteers, I will select 15 teachers and support staff personnel and create five teacher cadre teams, with three educators in each team. I will develop teacher cadres who are masters in BL and who understand how to facilitate and implement interventions within the BL structure. The five cadre teacher teams would deliver BL training to current and new ELA teachers. In addition, they would provide yearly refresher training to ELA teachers as needed.

Timeline

After my study is completed and approved, I will set up a meeting with district administration, to include the superintendent, head of the literacy department for the district, principals, assistant principals, teachers, and other support staff personnel such as the dean of students, academic or literacy facilitators, literacy coaches, and PD coaches. The proposed plan would be to obtain approval to implement the BL PD program in August 2023 as part of teachers' and support staff personnel's PD training. During the meeting, I will share the findings from the study and reasons for developing the BL PD project. At the end of my presentation, I will recommend that continued BL PD takes

place monthly and that formative and summative evaluations are used to evaluate or

assess the efficacy of the BL PD training being implemented. Table A1 shows the

proposal for implementation of proposed goals and timeline for ELA teachers and

support staff personnel who will volunteer to take part in the BL PD training to become

master BL trainers.

Table A1

Proposal for Implementation of Goals and Timeline

Timeline Stage	Activities
Fall 2022	Meet with district administration, to include the superintendent, head of the literacy department for the district, principals, assistant principals, teachers, and other support staff personnel such as the dean of students, academic or literacy facilitators, literacy coaches, and PD coaches.
	During the meeting, discuss the study findings and reasons for the BL PD project development.
	Recommend that continued BL PD takes place monthly and formative and summative evaluations are used to evaluate the effectiveness of the BL PD training being implemented.
Spring 2023	Obtain approval to implement the BL PD program in August 2023 as part of teachers' and support staff personnel's PD training.
	Recruit volunteers to take part in the BL PD, where I will target master teachers and support staff personnel and select 15 teachers and support staff personnel. I will create five teacher cadre teams, with three educators in each team. I
	Email registration information to selected participants.
July 2023	Email registration information reminders to selected participants.
August 2023	Secure room and set up technological resources, presentation materials, and refreshments.
PD Day 1: August 2023	Goal 1: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will review literacy data from

Timeline Stage	Activities
	district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction.
	Goal 2: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity.
	Goal 3: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students.
PD Day 2: August 2023	Goal 4: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs.
	Goal 5: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will write a lesson plan reflecting the BL components.
PD Day 3: August 2023	Goal 6: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will model a lesson using the BL components through teacher teams.
	Goal 7: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.

Note. PD = professional development; BL = balanced literacy; ELA = English language

arts.

Activities Outlined for Day 1

Target Audience: ELA teachers and support staff personnel who are master BL teachers.
Setting: School conference room.
Purpose: • To develop capacity building within Cityside School District using master teachers and support staff teams.
Morning of Day 1 Learning Outcomes: • Goal 1: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will review literacy data from district elementary data set for third through fifth grade and identify student skills to be prioritized for literacy instruction.
Afternoon of Day 1 Learning Outcomes: • Goal 2: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will demonstrate understanding of the nine main BL components and demonstrate how to implement them with fidelity. • Goal 3: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will identify BL facilitation strategies to meet the prioritized literacy skills for students.
Length of Activities: 8 hours
Materials Needed: • 7 oblong tables and 21 folding chairs • Basket of ink pens • Sign-in sheets • Name tags • Coffee, tea, juice • Door prizes • Candy for tables • Brochures on BL • Literacy data • Example lesson plans • Day 1 PowerPoint Presentation • Day 1 Evaluation forms to be handed out to participants • Handouts (BL components) • Laptops • Document camera • Overhead projector • Projection screen • Internet access • Speakers • Microphone

- Promethean board/Smartboard
- Post-it chart paper
- Post-it notes
- Easel for post-it notes
- Markers
- Pencils
- Big charts
- Composition notebook for reflective journaling
- Book: *This is Balanced Literacy, Grades K-6* (Fisher et al., 2014)
- Homework assignment for support staff personnel and teachers: Reflection on Day 1 and how will you utilize what you learn in your classroom daily? Any questions or comments that you need to ask for Day 1, please write them down.
- Exit tickets
- Daily evaluation forms
- Box for attendee evaluation form

Evaluation:
- Attendees will leave their exit tickets sticky notes on a chart paper and Day 1 evaluation forms in designated box on tables before leaving the presentation.

Day 1 Professional Development: Literacy – You Got This, Increasing Students' Achievement!
Agenda

Agenda	
Time	Outline
8:30 a.m. – 8:45 a.m.	Participants arrive and get refreshments
8:45 a.m. – 9:15 a.m.	Facilitator will welcome everyone to *Literacy – You Got This, Increasing Students' Achievement!* We appreciate you taking the time out of your busy schedule to attend *Literacy – You Got This, Increasing Students' Achievement!* Day 1 Session PD –Training PowerPoint (PPT) slides below will be used throughout the Day 1 PD training. **Activity 1:** The facilitator will guide the following activities: Introduction/Icebreaker – Although most educators have years of experience in this district, there is always some turnover. So, it is good to do an introduction. Please share your name, role, school, and a dance/movement that

	symbolize you. The challenge is that everyone will have to repeat the previous person's name and movement. The last person has the biggest challenge. The group speaker will introduce everyone to the group.
	There will be three participants sitting at five tables, which will create five small groups. Small group stations are located on the back walls.
9:15 a.m. – 9:30 a.m.	The purpose of *Literacy – You Got This, Increasing Students' Achievement*, is to develop capacity building within Cityside School District using master teachers and support staff teams."
9:30 a.m. – 10:00 a.m.	**Activity 2:** Literacy Data Analysis Activity Teachers and support staff personnel teachers will use their school's data to examine their school's end-of-grade (EOG) testing data. Using sticky notes' teachers and support staff personnel will identify third through fifth grade scores and determine how many students are grade proficient or better. Note: Students who are grade proficient scored 3–5 on their literacy EOG testing. • Examine the EOG testing for third through fifth grade students' data. • Compare school to district proficiency scores. • Identify student skills to be prioritized for literacy instruction. • Record reflections on post-it note poster. • Share by cadre. As teacher evaluate data, ask yourself the following questions: • What is the percentage difference between the school versus the district's percentage in third through fifth grade? • What grade level needs the most attention for next school year? • What are some new ideas on how to increase students' performance? How can this be implemented for next school year?

	• Based on the district's elementary data, what are some prioritized needs that elementary literacy needs?

10:00 a.m. – 10:30 a.m.	**Activity 3:** Balanced Literacy Components
	
	The facilitator will ask the following questions to the group: (a) What is BL and (b) how do you effectively implement BL?
	   • Think-Pair- Share (Anchor Chart PPT)
	   • Watch the video – Balanced Reading Instruction
	   • Quick write-responses in reflection journal
	https://www.youtube.com/watch?v=jD6s7x95KVA
	
	After watching the video, ask yourself the following questions:
	   • What is BL?
	   • How do you effectively implement BL?
	
	Teachers and support staff personnel will reflect on video in their reflection journal.

10:30 p.m. – 10:45 a.m.	Break

10:45 a.m. – 11:15 a.m.	**Activity 4:** KWL Chart and Building Capacity Definition
	
	"Capacity building is defined as the process of developing and strengthening the skills, instincts, abilities, processes, and resources that organizations and communities need to survive, adapt, and thrive in a fast-changing world" (United Nations, 2002).
	
	   • Complete the KWL Chart – What I KNOW and What I WANT to Know
	   • Review the six conditions of capacity building handout
	   • Review Giuliani et al.'s (2016) article, "Bringing GEOSS services into practice: A capacity building resource on spatial data infrastructures (SDI)," p. 831
	   • Work in groups and discuss the three levels of capacity building
	   • Roundtable – discuss six conditions of capacity building with your group: https://michaelfullan.ca/wp-content/uploads/2016/06/Untitled_Document_8.pdf

	• Complete the KWL Chart- What I LEARNED
11:15 a.m. –12:00 p.m.	**Activity 5:** Pass out and read Monson-Rosen's (2021) article, "Capacity Building: What It is and Why it Matters" • Read Jigsaw Reading Article Together • Group 1 reads p. 1 • Group 1 reads p. 2 • Group 1 reads p. 3 • Group 1 reads p. 4 • Group 1 reads p. 5 • Groups will give a summary of what they read on chart paper and present. • Present the definition and six key areas of capacity building • Table Talk –10 minutes "Capacity building is defined as the process of developing and strengthening the skills, instincts, abilities, processes, and resources that organizations and communities need to survive, adapt, and thrive in a fast-changing world" (United Nations, 2002). Present Fullan and Quinn's (2010) six key areas of capacity building: 1. **Develop collective capacity to impact results.** Strategies to build new capacities focus on developing a common base of knowledge, set of skills, and commitment to connect roles and mobilize action at all levels of the system including state levels. It is crucial that strategies are based on teachers working together as teams to learn from evidence on student learning. It is this collective capacity in addition to individual capacity that has the greatest impact on learning. 2. **Reframe perspective - create collective focus.** Shift from the mindset of multiple state level departments and agencies offering piecemeal services and accountability to focused and coherent capacity building at all levels to support and drive local implementation. 3. **Reduce distracters.** Ensure that schools and districts concentrate relentlessly on instructional

	improvement. Focus state, district and schools' efforts on a small number of priorities (three to four). Reduce distracters by removing competing priorities, nonessential paperwork, and demands that draw focus and time from the work in the classroom, school, and community. 4. **Shift the balance of capacity building and accountability.** The current emphasis on elaborate accountability measures, performance review protocols, extensive improvement plans, etc., dominates the leader's time. Most district/school leaders and teachers' time must be spent increasing their ability to impact student learning. Data are used primarily to make improvements. Transparency and targeted intervention are used to build capacity and hold people accountable. 5. **Constantly develop knowledge and skills.** A common base of knowledge and set of skills is identified. The knowledge and skills are tailored and applied across specific roles and levels in the system. Effective learning processes incorporate learning teams where the design includes the continuous infusion of new knowledge with opportunities to practice the skills on the job and then return to the learning team to share results. 6. **Foster mutual allegiance and collaborative competition.** Building lateral connections for dialogue and learning across and within roles, schools, districts, and states deepen the shared knowledge base and acts as a catalyst for new thinking and deeper levels of implementation. Participants become committed to each other and to the success of the whole system while also being stimulated to higher levels of achievement as they try to outdo their previous performance and compete constructively with each other. (p. 1)
12:00 p.m. – 1:00 p.m.	Lunch Break
1:00 p.m. –1:45 p.m.	**Activity 6**: Balance Literacy Goals and Components • Teachers and support staff personnel are given handout with BL components and goals.

	• Groups work together and write about how to implement BL goals. • Write goals on post-it notes on how to implement BL with fidelity. Reflections are posted on post -it-note poster. • Share by cadre teams. **Question:** How will these BL goals be implemented with fidelity? Work in groups using chart paper to write down goals of implementing BL goals and components with fidelity. Gallery walks on implementing with fidelity **Definitions:** *Fidelity*: The level or degree to which an intervention, program, or practice is provided to students as intended (McKenna et al., 2014, p.15). *Fidelity of implementation (FOI)*: FOI or implementation fidelity is also known as *integrity* or *adherence* (Carroll et al., 2007; Dane & Schneider, 1998; Dusenbury et al., 2003; Mihalic, 2004). Carroll et al. (2007) defined FOI as "the degree to which an intervention or program is delivered as intended" (p. 40).
1:45 p.m. – 2:00 p.m.	**Activity 7:** Reflection Reflection: Reflect on what you learned before lunch. Any questions, response, reflections, please write in your reflection journal. Discuss with a partner and share with the group.
2:00 p.m. – 2:45 p.m.	**Activity 8:** Capacity Building Questions • Teachers and support staff personnel will ask capacity questions. • Answer questions in reflection notebook • Discuss questions in groups Questions to ELA teachers and support staff personnel (cadre of teacher teams): • How will you build in support for teachers? • How will you build in booster sessions? • How will you monitor the students learning and take data?
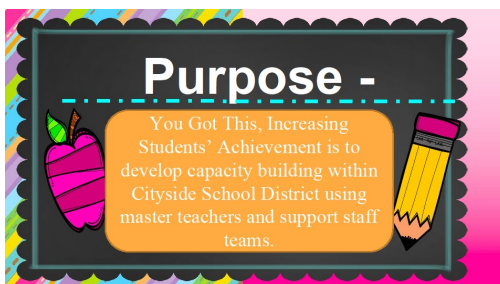
	Groups discuss these questions and develop a plan of implementation.
2:45 p.m. –3:00 pm	Break
3:00 p.m. – 3:30 p.m.	**Activity 9:** Review Fisher et al. (2014) book pages, *This is balanced literacy, grades K-6 (pp.147-149)* Distribute pages from Fisher et al. (2014) book. Read Fisher et al. (2014) book pages, *This is balanced literacy, grade K-6, pp. 147-149.* Using a post-it note, give an example of how you would facilitate strategies to meet the prioritized literacy (writing, composition) skills for students. Give an example using the facilitated strategy in a lesson to meet the prioritized literacy skills for students.
3:30 p.m. – 4:15 p.m.	**Activity 10:** Video: Medaro's (2013, September 20) *Inference and conclusions practice – true move commercial* Participants will watch the video, *Inference and conclusions practice – true move commercial,* https://www.youtube.com/watch?v=HDi66yKKxDM The facilitator will debrief by asking participants: • What is one thing that you will learn today and implement inside your classroom? • Based on the video, what strategy did you use? • How will you be able to use BL? Then have a few volunteers share one of their items. Participants will reflect and write about how they will use components of BL to teach a lesson on inferencing. What components did you use? Reflect in your journal and share with someone at your table. Gallery Walk to read Quick Write Notes
4:15 p.m. – 4:30 p.m.	**Activity 11:** Complete Exit Ticket Parking Lot - One Way I Can CONNECT Today's Lesson to my Life is and Complete Daily Evaluation

	- The facilitator will recap Day 2 PD training. - Complete exit ticket Parking Lot - One way I can CONNECT today's lesson to my life is. - Once completed, please place your exit ticket sticky note on the Chart Paper, titled, Parking Lot! - The facilitator will distribute and discuss the evaluation form, its' purpose for future training sessions, and give time for participants to fill out their forms, *Literacy – You Got This, Increasing Students' Achievement! Professional Development Training Session Evaluation*. - Complete daily evaluation form. - Attendees will leave their Day 2 evaluation forms in designated box on tables before leaving the presentation. **Day 1 PPT Slides Below**

Day 1 Session PD –Training PowerPoint Slides

Slide 1

Slide 2

Slide 3

Slide 4

Purpose -

You Got This, Increasing Students' Achievement is to develop capacity building within Cityside School District using master teachers and support staff teams.

Slide 5

Day 1: Goal

Develop a cadre of support staff and English and Language Arts (ELA) teachers who will provide professional development (PD), technical support, and modeling of the balanced literacy (BL) instruction to support the implementation of BL with fidelity.
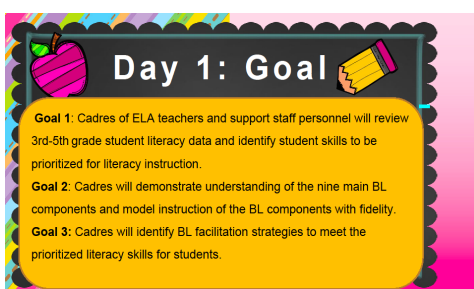
Slide 6

Day 1: Goal

Goal 1: Cadres of ELA teachers and support staff personnel will review 3rd-5th grade student literacy data and identify student skills to be prioritized for literacy instruction.

Goal 2: Cadres will demonstrate understanding of the nine main BL components and model instruction of the BL components with fidelity.

Goal 3: Cadres will identify BL facilitation strategies to meet the prioritized literacy skills for students.

Slide 7
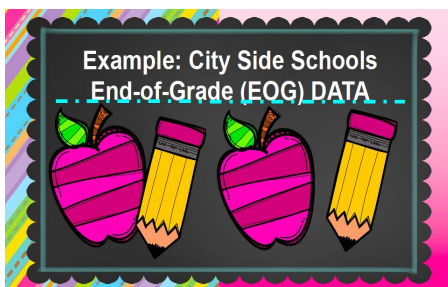
Activity 2

Literacy Data Analysis Activity

Slide 8

Example: City Side Schools End-of-Grade (EOG) DATA
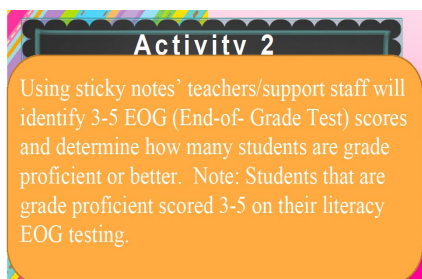
Slide 9

Grade Level	School proficiency	District proficiency
ELA State Test Grades 3-8: Percent scoring proficient	30%	40%
Grade 3: Percent scoring proficient or better	29%	40%
Grade 4: Percent scoring proficient or better	22%	32%
Grade 5: Percent scoring proficient or better	24%	34%

Slide 10

Activity 2
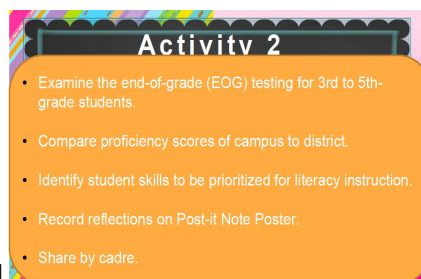
Using sticky notes' teachers/support staff will identify 3-5 EOG (End-of- Grade Test) scores and determine how many students are grade proficient or better. Note: Students that are grade proficient scored 3-5 on their literacy EOG testing.

Slide 11

Activity 2

- Examine the end-of-grade (EOG) testing for 3rd to 5th-grade students.
- Compare proficiency scores of campus to district.
- Identify student skills to be prioritized for literacy instruction.
- Record reflections on Post-it Note Poster.
- Share by cadre.

Slide 12

Slide 13

Slide 14

Slide 15

Slide 16

Slide 17

Slide 18

Slide 19

Slide 20

Activity 4

Capacity- building is defined as the process of developing and strengthening the skills, instincts, abilities, processes, and resources that organizations and communities need to survive, adapt, and thrive.

Slide 21

Activity 4

- Complete the KWL Chart – What I KNOW and What I WANT to Know
- Look at the 6 Conditions of Capacity Building Handout
- Review Giuliani et al.'s (2016) article, *"Bringing GEOSS services into practice: A capacity building resource on spatial data infrastructures (SDI)"* – p. 831 (Three Levels of Capacity Building)

Slide 22

Activity 4

- Work in Groups and Discuss the Three Levels of Capacity Building
- Review- 2020 6 steps for capacity building
- Roundtable Discuss – 6 Conditions of Capacity Building with your group – 6 steps for Capacity Building
- Complete the KWL Chart – What I LEARNED

Slide 23

KWL Chart- What I know and What I want to

K What I KNOW	
W What I WANT to Know	
L What I LEARNED	

Slide 24

Activity 5

Reading Article - "Capacity Building: What it Is and Why it Matters" and Jigsaw Activity"

Slide 25

Reading Article - "Capacity Building: What it Is and Why it Matters"

Read Monson-Rosen's (2021) article, *"Capacity building: What is it and why it matters"* – Pass out to Participants
- Jigsaw Reading Article Together
- Group 1 Read p. 1-2
- Group 2 - Read pp. 3-4
- Group 3 - Read p. 5
- Groups will give a summary of what they read on chart paper and present.

Slide 26

Activity 5: Capacity Building Definition

- **Capacity building:** "The process of developing and strengthening the skills, instincts, abilities, processes, and resources that organizations and communities need to survive, adapt, and thrive in a fast-changing world" (United Nations, 2022, para. 1).

Slide 27

Activity 5: 6 Key Areas of Capacity Building #1

- **Develop collective capacity to impact results.** Strategies to build new capacities focus on developing a common base of knowledge, set of skills, and commitment to connect roles and mobilize action at all levels of the system, including state levels. It is crucial that strategies are based on teachers working together as teams to learn from evidence on student learning. It is this collective capacity in addition to individual capacity that has the greatest impact on learning (Fullan & Quinn, 2010).

Slide 28

Activity 5: 6 Key Areas of Capacity Building#2

- **Reframe perspective - create collective focus.** Shift from the mindset of multiple state level departments and agencies offering piecemeal services and accountability to focused and coherent capacity building at all levels in order to support and drive local implementation (Fullan & Quinn, 2010).

Slide 29

Activity 5: 6 Key Areas of Capacity Building#3

- **Reduce distracters.** Ensure that schools and districts concentrate relentlessly on instructional improvement. Focus state, district, and school's efforts on a small number of priorities, approximately three to four. Reduce distracters by removing competing priorities, nonessential paperwork, and demands that draw focus and time from the work in the classroom, school, and community (Fullan & Quinn, 2010).

Slide 30

Activity 5: 6 Key Areas of Capacity Building#4

Shift the balance of capacity building and accountability. The current emphasis on elaborate accountability measures, performance review protocols, and extensive improvement plans, dominates the time of leaders. The majority of district/school leaders and teacher's time must be spent increasing their ability to impact student learning. Data are used primarily to make improvements. Transparency and targeted intervention is used to build capacity and hold people accountable (Fullan & Quinn, 2010).

Slide 31

Activity 5: 6 Key Areas of Capacity Building#5

Constantly develop knowledge and skills. A common base of knowledge and set of skills is identified. The knowledge and skills are tailored and applied across specific roles and levels in the system. Effective learning processes incorporate learning teams where the design includes the continuous infusion of new knowledge with opportunities to practice the skills on the job and then return to the learning team to share results (Fullan & Quinn, 2010).

Slide 32

Activity 5: 6 Key Areas of Capacity Building#6

Foster mutual allegiance and collaborative competition. Building lateral connections for dialogue and learning across and within roles, schools, districts, and states deepens the shared knowledge base and acts as a catalyst for new thinking and deeper levels of implementation. Participants become committed to each other and to the success of the whole system while also being stimulated to higher levels of achievement as they try to outdo their previous performance and compete constructively with each other (Fullan & Quinn, 2010).

Slide 33

Table Talk 10 minutes

10:00

Slide 34

Activity 6

Balanced Literacy Goals and Components

Slide 35

Activity 6

- Teachers and support staff personnel receive handout with balanced literacy components and goals.
- Groups work together to write down - How to implement balanced literacy goals?
- Record goals on post-it on how to implement with fidelity. Reflections on Post-it Note Poster.
- Share by cadre teams.

Slide 36

Slide 37

Slide 38

Slide 39

Slide 40

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Slide 51

Slide 52

Day 1: Activity 2 - School Data

Grade Level	School proficiency	District proficiency
ELA State Test Grades 3–8: Percent scoring proficient		
Grade 3: Percent scoring proficient or better		
Grade 4: Percent scoring proficient or better		
Grade 5: Percent scoring proficient or better		

Teachers and support staff personnel will use the anchor chart above to help them prioritize and examine their district elementary EOG data. The anchor chart will help them to categorize their sticky notes that they used to prioritize the literacy standards that needs to be taught based on the district's data.

Day 1: Activity 3 – Reflection

Balanced Reading Instruction: https://www.youtube.com/watch?v=jD6s7x95KVA
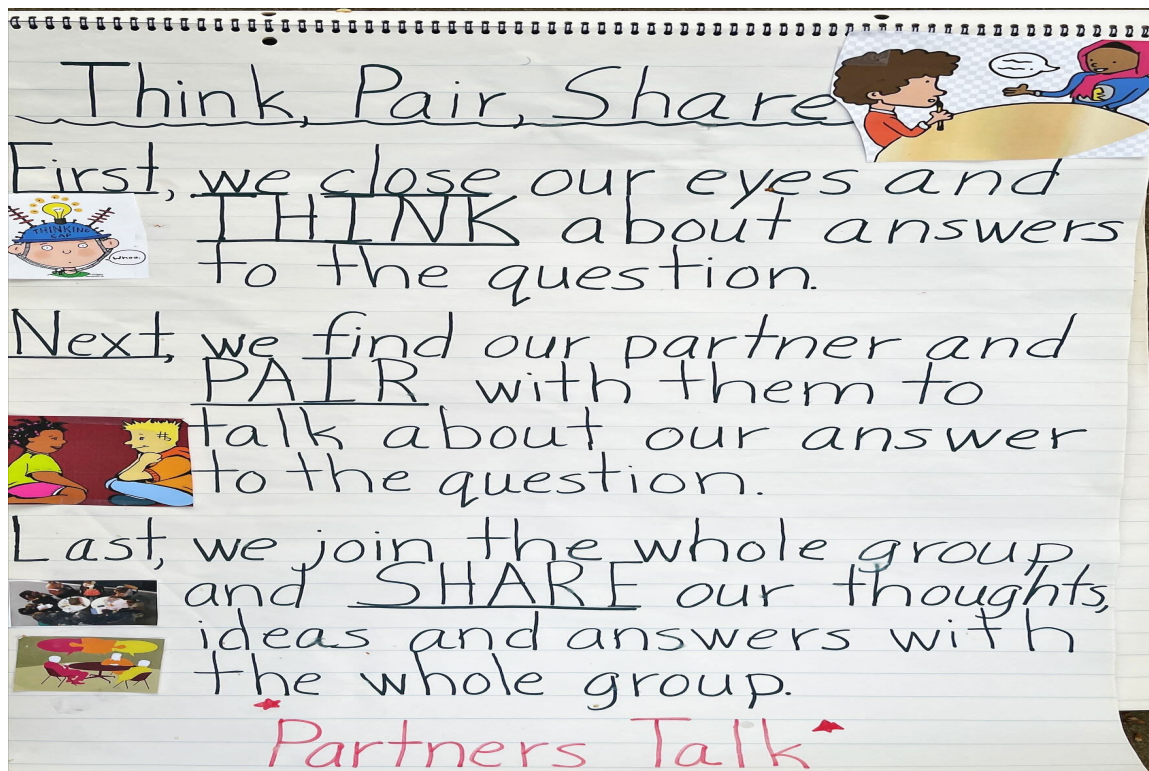
We have watched the video, "Balanced Reading Instruction":
https://www.youtube.com/watch?v=jD6s7x95KVA
- Based on the video, what are your thoughts on the video?
- What have you learned from video?
- Based on the video, what does balanced reading includes?
- What is one key component that you will implement into your classroom?
- Why?

Please write these ideas down on a page in your refection journal. You have 3 minutes to write. Now, you have 3 minutes to write something positive about your peers' writing

Quick Writing Rules:
Now, you will move around the room and read other participants' writing in their reflection notebook. On your sticky note, please reply to your fellow participants by sharing your thoughts about what they wrote regarding the video.

Day 1: Activity 4 – KWL Chart and Capacity Building for Whole System Reform

K What I KNOW	
W What I WANT to Know	

"Collective capacity building involves the increased ability of educators at all levels of the system to make the instructional changes required to raise the bar and close the gap for all students" (Fullan & Quinn, 2010, p. 1).

Conditions

1. **Develop collective capacity to impact results.** Strategies to build new capacities focus on developing a common base of knowledge, set of skills, and commitment to connect roles and mobilize action at all levels of the system including state levels. It is crucial that strategies are based on teachers working together as teams to learn from evidence on student learning. It is this collective capacity in addition to individual capacity that has the greatest impact on learning.

2. **Reframe perspective - create collective focus.** Shift from the mindset of multiple state level departments and agencies offering piecemeal services and accountability to focused and coherent capacity building at all levels to support and drive local implementation.

3. **Reduce distracters.** Ensure that schools and districts concentrate relentlessly on instructional improvement. Focus state, district and schools' efforts on a small number of priorities (three to four). Reduce distracters by removing competing priorities, nonessential paperwork, and demands that draw focus and time from the work in the classroom, school, and community.

4. **Shift the balance of capacity building and accountability.** The current emphasis on elaborate accountability measures, performance review protocols, extensive improvement plans, etc., dominates the leader's time. Most district/school leaders and teachers' time must be spent increasing their ability to impact student learning. Data are used primarily to make improvements.

Transparency and targeted intervention are used to build capacity and hold people accountable.

5. **Constantly develop knowledge and skills.** A common base of knowledge and set of skills is identified. The knowledge and skills are tailored and applied across specific roles and levels in the system. Effective learning processes incorporate learning teams where the design includes the continuous infusion of new knowledge with opportunities to practice the skills on the job and then return to the learning team to share results.

6. **Foster mutual allegiance and collaborative competition.** Building lateral connections for dialogue and learning across and within roles, schools, districts, and states deepen the shared knowledge base and acts as a catalyst for new thinking and deeper levels of implementation. Participants become committed to each other and to the success of the whole system while also being stimulated to higher levels of achievement as they try to outdo their previous performance and compete constructively with each other. (Fullan & Quinn, 2010, p. 1)

Day 1: Activity 6 – Balanced Literacy Goals/Meaning and Components

Balanced Literacy Goals/Meaning and Components
Balanced literacy (BL): BL is described as "a philosophical orientation that focuses on reading and writing achievement that are developed through instruction and support in many environments, where teachers use different approaches that vary by teacher support and child control levels" (Frey et al., 2005, p. 272). Thus, BL "seeks to combine or balance skill-based and meaning-based instruction to ensure positive reading and writing results in children" (Bingham & Hall-Kenyon, 2013, p. 15). The five main BL reading components include shared reading, interactive read aloud, independent daily reading, small group instruction or guided reading, and word study (Learning A-Z, 2018; Policastro, 2018; West Orange Board of Education [WOBOE], 2016). The four main BL writing components include shared/interactive writing, modeled writing, guided writing, and independent writing (Learning A-Z, 2018; Policastro, 2018; WOBOE, 2016).
Guided writing: A BL writing component, where "students create and write in small groups while the teacher guides the process" (Teach For America, 2011, p. 133).
Independent daily reading: A BL reading component that is done independently as students read text, which may be "self-selected or teacher recommended, at their independent reading level to practice reading strategies, and develop fluency" (New Hope-Solebury School District [NHSD], 2018, p. 1) and automatic word recognition (Frey et al., 2005; WOBOE, 2016).

Independent writing: A BL writing component, which pertains to students reading a text or book to themselves without the teacher's instruction or support and creating and writing while the teacher monitors their progress and intervenes when it is appropriate (Frey et al., 2005; Teach For America, 2011).

Interactive read aloud: A BL reading component and includes whole or small group instruction, where teachers read the text or book to students, and they are the only ones with copy of the text (Frey et al., 2005; Policastro, 2018).

Modeled writing: A BL writing component that is the most popular teacher-directed approach as the teacher writes and creates text in front of students, controlling the pen, and constantly thinks out load about writing skills and strategies (WOBOE, 2016).

Shared/interactive writing: A BL writing component, which pertains to teachers modeling thinking aloud as they write so that students can see how good writer's thought process works (WOBOE, 2016).

Shared reading: A BL reading component and includes whole or small group instruction (Policastro, 2018). In addition, shared reading includes interactive reading where students join in or share the reading of a big book or other enlarged text while the teacher guides and supports them (Frey et al., 2005; NHSD, 2018; WOBOE, 2016).

Small group instruction or guided reading: This BL component includes guided reading, partner reading, skills groups, book clubs, and conferences (WOBOE, 2016). The teacher places students who have the same reading level together so that they can read books at their instructional level (NHSD, 2018; Pinnell & Fountas, 2010; WOBOE, 2016).

Word study: A BL reading component that refers to the study of the alphabetic symbol system (NHSD, 2018). It includes phonics in relation to letter and sound relationship, grammar, mechanics, spelling, vocabulary, morphemic analysis in relation to the use of "word parts to denote meaning, and automaticity for sight words" (NHSD, 2018, p. 1; WOBOE, 2016).

Day 1 – Activity 11: Exit Ticket and Daily Evaluation

Day 1 – Exit Ticket

<div style="background-color: yellow; padding: 1em;">

One Way I Can CONNECT today's lesson to my life is

</div>

Day 1 – Daily Evaluation

Thank you for your participation in Day 1 Professional Development (PD) Training Session of *Literacy – You Got This, Increasing Students' Achievement!* Your feedback will provide valuable information to improve future training sessions.

Reflection Questions

Please describe your role, position, and responsibility.

Did you obtain the intended knowledge and skills in the PD training?

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Based on the morning and afternoon sessions, did you find any resources useful that will support balanced literacy training opportunities for your school?

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I would have appreciated more time to extend my learning as it relates to the following topic or content in the course:

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This learning opportunity will help me to be effective in my job.

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I will apply today's learning and begin initial implementation at my job in the following manner:

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Please offer comments related to your experience or to anything else regarding this professional development.

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Activities Outlined for Day 2

Target Audience: ELA teachers and support staff personnel who are master BL teachers.
Setting: School conference room.
Purpose: To develop capacity building within Cityside School District using master teachers and support staff teams.
Morning of Day 2 Learning Outcomes: • Goal 4: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs.
Afternoon of Day 2 Learning Outcomes: • Goal 5: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will write a lesson plan reflecting the BL components.
Length of Activities: 8 hours
Materials Needed: • 7 oblong tables and 21 folding chairs   • Basket of ink pens   • Sign-in sheets   • Name tags   • Coffee, tea, juice   • Door prizes   • Candy for tables   • Brochures on BL   • Literacy data   • Example lesson plans   • Day 2 PowerPoint Presentation   • Day 2 Evaluation forms to be handed out to participants   • Handouts (BL components)   • Laptops   • Document camera   • Overhead projector   • Projection screen   • Internet access   • Speakers   • Microphone   • Promethean board/Smartboard   • Post-it chart paper   • Post-it notes   • Easel for post-it notes

- Markers
- Pencils
- Big charts
- Composition notebook for reflective journaling
- Lesson Plan Template
- Book: Fullan's (2008) *The six secrets of change: What the best leaders do to help their organization survive and thrive.*
- Homework assignment for support staff personnel and teachers: Reflection on Day 2 and how will you utilize what you learn in your classroom daily? Any questions or comments that you need to ask for Day 2, please write them down.
- Exit tickets
- Daily evaluation forms
- Box for attendee evaluation form

Evaluation:
- Attendees will leave their exit tickets sticky notes on a chart paper and Day 2 evaluation forms in designated box on tables before leaving the presentation.

Day 2 Professional Development: Literacy – You Got This, Increasing Students' Achievement!
Agenda

Agenda	
Time	Outline
8:30 a.m. – 8:45 a.m.	Participants arrive and get refreshments
8:45 a.m. – 9:15 a.m.	Day 2 Session PD –Training PPT slides below will be used throughout the Day 2 PD training. **Activity 1:** Reflection The facilitator will guide the following activities: Recap from Day 1 Training - In your group, discuss one thing that you thought about this morning from yesterday's training that you would love taking back to someone at your school and why? What were some glows and grows from Day 1? The facilitator will discuss with the group the purpose of the BL PD training session, which is to develop capacity building within Cityside School District using master teachers and support staff teams.

9:15 a.m. – 9:45 a.m.	**Activity 2:** Coaching and Consultative Behavior Checklist
	• Groups will discuss questions presented on the PPT slides.
	• Making a list of how effective coaching should look.
	Questions: Discuss at your tables
	How can ELA teachers and support staff personnel who are master BL teachers create BL coteaching lessons designed to support delivery of varying facilitation strategies and interventions to meet students' literacy needs?
	Make a list of how effective coaching should look.
9:45 a.m. – 10:00 a.m.	Break
10:00 a.m. – 10:30 a.m.	**Activity 3:** Michael Fullan's Video
	Questions to ELA teachers and support staff personnel:
	• How will you provide support for ELA teachers?
	• How will you provide booster sessions?
	• How will you monitor students' academic success and track data?
	The facilitator will say: Now that you have discuss with your group what coaching should look like and how effective coaching is defined, look at the video and listen to Michael Fullan on the best leaders do to help their organizations survive and thrive.
	The facilitator will ask the participants to take notes in their journal as they watch the video.
	• Video: https://www.youtube.com/watch?v=iZtXlF90cHM
	• Look at the video and listen to Michael Fullan on what the best leaders do to help their organizations survive and thrive.
	• Participants will take notes in their journal as they watch the video.
	• Participants will discuss their notes and respond to the question using the popcorn out method to answer questions in their groups.

	• Participants at each table will use the popcorn out method to answer questions on poster board to share with their table. **Questions:** 1. How can you create lessons with different facilitation strategies and interventions to meet students' literacy needs? 2. What is coaching? 3. What is effective coaching? 4. How does it look to you? Participants will make a list to show how effective coaching should look to them.
10:30 a.m. – 11:30 a.m.	**Activity 4**: Michael Fullan's Six Secret of Change Presenter will present Fullan's (2008) six secrets of change: • Review Michael Fullan's six secrets of change. • Work in groups on assigned chapter. • Present assigned chapter as PowerPoints, skit, movie skit, anchor chart paper, song, or commercial. The facilitator will go over the six secrets using a PPT presentation, and everyone will receive a handout with the below information. **Six Secrets of Change by Michael Fullan:** 1. **Love your employees:** The key is in enabling employees to learn continuously and to find meaning in their work and in their relationship to coworkers and to the company as a whole. 2. **Connect peers with purpose:** The job of leaders is to provide good direction while pursuing its implementation through purposeful peer interaction and learning in relation to results. 3. **Capacity building prevails:** Capacity building entails leaders investing in the development of individual and collaborative efficacy of a whole group or system to accomplish significant improvements. 4. **Learning is the work:** Learning external to the job can represent a useful input, but if it is not in

<table>
<tr><td></td><td>balance and in concert with learning in the setting in which you work, the learning will end up being superficial.

5. **Transparency rules:** Clear and continuous access to practice (what is being done to get the results). Transparency can be abused, such as when results are used punitively, but there is no way that continuous improvement can occur without constant transparency fueled by good data.

6. **Systems learn:** People learn new things all the time, and their sense of meaning and their motivation are continually stimulated and deepened. (Fullan, 2008, 11-14)

Videos:
- Hemenway's (2015) video, *Fullan's six secrets of change 638*. https://www.youtube.com/watch?v=iD4ksLr95qM
- University of San Diego's (2009) video, *Michael Fullan ELDA summer institute*, which focuses on the six secrets of change. https://www.youtube.com/watch?v=xLgrLwJ3Cf8

After the overview, four of the five teacher cadre teams, with three educators in each team, will be assigned a chapter from the Fullan text (five of the six chapters). The fifth team will be assigned the two shortest chapters (Chapters 2 and 5). The group will write the key points of what they read and record the main ideas of the chapter on Chart paper and post it in the room. The group will decide how to present and teach the main ideas of the chapter to the other groups.

Participants will be able to choose how they want to present to the group. Examples of teaching approaches/presentation strategies may include PowerPoints, skit, movie Skit, anchor chart paper, song, commercial, etc. Participants will be encouraged to make their presentation fun and unique.</td></tr>
<tr><td>11:30 a.m. –12:00 p.m.</td><td>**Activity 5:** Fullan's Six Secrets of Change Videos

Videos:</td></tr>
</table>

	• Hemenway's (2015) video, *Fullan's six secrets of change 638*. https://www.youtube.com/watch?v=iD4ksLr95qM • University of San Diego's (2009) video, *Michael Fullan ELDA summer institute*, which focuses on the six secrets of change. Participants will be able to choose how they want to present to the group. Examples of teaching approaches/presentation strategies may include PowerPoints, skit, movie Skit, anchor chart paper, song, commercial, etc. Participants will be encouraged to make their presentation fun and unique.
12:00 p.m. – 1:00 p.m.	Lunch
1:00 p.m. –2:45 p.m.	**Activity 5 Continues:** Fullan's Six Secrets of Change Videos Videos: • Hemenway's (2015) video, *Fullan's six secrets of change 638*. https://www.youtube.com/watch?v=iD4ksLr95qM • University of San Diego's (2009) video, *Michael Fullan ELDA summer institute*, which focuses on the six secrets of change. Participants will be able to choose how they want to present to the group. Examples of teaching approaches/presentation strategies may include PowerPoints, skit, movie Skit, anchor chart paper, song, commercial, etc. Participants will be encouraged to make their presentation fun and unique.
2:45 p.m. –3:00 pm	Break
3:00 p.m. – 4:00 p.m.	**Activity 6:** Developing Lesson Plans Facilitators will discuss with the group that each group will write a lesson plan reflecting the BL components. • Participants will write a lesson plan reflecting the BL components. • Facilitators and participants will create the lesson plan on big sheets. • Facilitators will provide templates of the lesson plans.

	• Lesson plans will be written on big sheets of paper for gallery walk. • During gallery walk, participants will walk around and put dots on their favorite lesson plans. • Volunteers will teach their lesson plan.
4:00 p.m. – 4:30 p.m.	**Activity 7:** Complete Exit Ticket Parking Lot - One Way I Can CONNECT Today's Lesson to my Life is and Complete Daily Evaluation • The facilitator will recap Day 2 PD training. • Complete exit ticket Parking Lot - One way I can CONNECT today's lesson to my life is. • Once completed, please place your exit ticket sticky note on the Chart Paper, titled, Parking Lot! • The facilitator will distribute and discuss the evaluation form, its' purpose for future training sessions, and give time for participants to fill out their forms, *Literacy – You Got This, Increasing Students' Achievement! Professional Development Training Session Evaluation*. • Complete daily evaluation form. • Attendees will leave their Day 2 evaluation forms in designated box on tables before leaving the presentation. **Day 2 PPT Slides Below**

Day 2 Session PD –Training PowerPoint Slides

Slide 1

Slide 2

Slide 3

Slide 4

Slide 5

Slide 6

	Intensity of Coaching	Content Focus	Actionable Feedback	Supportive Presence	Reflective Guidance
Behaviors	Corrects misunderstandings in content or pedagogy in the moment rather than waiting until the lesson is over. Supports teacher in complete actions on his/her own rather than taking over instruction.	References key learning objectives. Uses domain-specific language directly linked to observation tools and standards.	References -specific teaching strategies -practices directly linked to observation tools -goal behaviors	Uses positive language (verbal and nonverbal). Encourages collaboration. Reinforces existing positive practices. Moves on once teacher indicates/shows understanding.	Uses reflective prompts/ language. Orients teacher to child signals during instruction (Crawford et al., 2017).

Slide 7

	Intensity of Coaching	Content Focus	Actionable Feedback	Supportive Presence	Reflective Guidance
Behaviors	Focuses on teacher behavior rather than issues unrelated to instruction. Clearly articulates/thinks aloud about processes and actions. Builds on what teacher is already doing and pushes for more sophisticated thoughts/actions	Rarely misses opportunities the content talk. Content references/ guidance is age appropriate.	Minimally narrates or summarizes events. Suggests adaptations/ modifications/ extensions to improve delivery of instruction/ support.	Recognizes and responds sensitively if teacher shows discomfort/ resistance.	Connects specific teacher action(s) to child behaviors/ response. Connects reflection to standards, objectives, exemplars, assessment results (Crawford et al., 2017)

Slide 8

Activity 2

- Groups will discuss questions presented on the PowerPoint.

Slide 9

Activity 2

- How can support staff personal create lessons with varying facilitation strategies and interventions to meet students' literacy needs?
- Make a list of how effective coaching should look.

Slide 10

Break Time 15 minutes

15:00

Slide 11

Activity 3

Michael Fullan Video

Slide 12

Activity 3

Questions to Support Staff Personnel and Teachers

How will you build in support for teachers?

How will you build in booster sessions?

How will you monitor the students learning and take data?

Slide 13

Activity 3

- Look at the video and listen to Michael Fullan on what the best leaders do to help their organizations survive and thrive.
- Participants will take notes in their journal as they watch the video.
- Participants will discuss their notes and respond to the question using the popcorn out method to answer questions in their groups.
- Participants at each table will use the popcorn out method to answer questions on poster board to share with their table.

Slide 14

Activity 3

How can a support staff personnel create lessons with varying facilitation strategies and interventions to meet students' literacy needs?

What is coaching?

What is effective coaching?

Slide 15

Activity 3

How does it look to you?

Participants will make a list of things to show how effective coaching should look to them?

Slide 16

Activity 3 - Michael Fullan's Video

Video

Slide 17

Activity 4

Michael Fullan's Six Secret of Change

Slide 18

Activity 4

- Review of Michael Fullan's *Six Secret of Change*
- Work in groups on assigned chapter
- Present assigned chapter as PowerPoints, Skit, Movie Skit, Anchor Chart Paper, Song, Commercial

Slide 19

Activity 4 - Michael Fullan's Six Secret of Cha

| Love your employees | The key is in enabling employees to learn continuously and to find meaning in their work and in their relationship to coworkers and to the company. |
| Connect peers with purpose | The job of leaders is to provide good direction while pursuing its implementation through purposeful peer interaction and learning in relation to results. |

Slide 20

Activity 4 - Michael Fullan's Six Secret of Cha

| Capacity building prevails | Capacity building entails leaders investing in the development of individual and collaborative efficacy of a whole group or system to accomplish significant improvements. |
| Learning is the work | Learning external to the job can represent a useful input, but if it is not in balance and in concert with learning in the setting in which you work, the learning will end up |

Slide 21

Activity 4 - Michael Fullan's Six Secret of Cha

| Transparency rules | Transparency can be abused, such as when results are used punitively. but there is not way that continuous improvement can occur without constant transparency fueled by good data. |
| Systems learn | People learn new things all the time. and their sense of meaning and their motivation are continually stimulated and deepened. |

Slide 22

Slide 23

Slide 24

Slide 25

Slide 26

Slide 27

Slide 28

Slide 29

Slide 30

Slide 31

Slide 32

Slide 33

Day 2 - Activity 2:
Coaching and Consultative Behaviors Checklist

	Intensity of Coaching	Content Focus	Actionable Feedback	Supportive Presence	Reflective Guidance
Competency	Adjust the level of support provided to match teacher needs in each instructional situation.	Identify gaps in a teacher's content knowledge and provide accurate guidance regarding skill development and core concepts.	Combine content-related input with specific guidance regarding appropriate pedagogy and teaching behavior.	Transmit information and provide support in a nonthreatening and collaborative manner.	Help teachers recognize connection between teacher behavior, child signals, and content aims across contexts.
Behaviors	Corrects misunderstandings in content or pedagogy in the moment rather than waiting until the lesson is over.	References key learning objectives.	References: -specific teaching strategies -practices directly linked to observation tools -goal behaviors.	Use positive language (verbal and nonverbal).	Uses reflective prompts.
	Supports teacher to complete actions on his/her own rather than taking over instruction.	Uses domain-specific language directly linked to observation tools and standards.	Minimally narrates or summarizes events.	Encourages collaboration .	Orients teacher to child signals during instruction.
	Interjects and offers clues/tips for modification.	Rarely misses opportunities for content talk.	Suggests adaptations/ modification/ extensions to improve delivery of	Reinforces existing positive practices.	Connects specific teacher action(s) to child behaviors/ response.

			instruction/support.		
	Focuses on teacher behavior rather than issues unrelated to instruction.	Content reference/ guidance is age appropriate.		Moves on once teacher indicates/ shows understanding.	Connects reflection to standards, objectives, exemplars, assessment results (Crawford et al., 2017).
	Clearly articulates/thinks aloud about processes and actions.			Recognizes and responds sensitively if teacher shows discomfort/ resistance.	
	Builds on what teacher is already doing and pushes for more sophisticated thoughts/ actions.				

Day 2 – Activity 2: Effective Coaching

What is Coaching?	What is effective coaching?	How does it look to you?

Day 2-Activity 4: The Six Secrets of Change by Michael Fullan

1. Love your employees	The key is in enabling employees to learn continuously and to find meaning in their work and in their relationship to coworkers and to the company.
2. Connect peers with purpose	The job of leaders is to provide good direction while pursuing to implementation through purposeful peer interaction and learning in relation to results.
3. Capacity building prevails	Capacity building entails leaders investing in the development of individual and collaborative efficacy of a whole group or system to accomplish significant improvements.
4. Learning is the work	The job can represent a useful input, but if it is not in balance and in concert with learning in the setting in which you work, the learning will end up being superficial.
5. Transparency rules	Transparency can be abused, such as when results are used punitively, but there is no way that continuous improvement can occur without constant transparency fueled by good data.
6. Systems learn	People learn new things all the time, and their sense of meaning and their motivation are continually stimulated and deepened. (Fullan, 2008, pp. 11-14)

Day 2 – Activity 5: Michael Fullan's Six Secret of Change

Love your employees	The key is in enabling employees to learn continuously and to find meaning in their work and in their relationship to coworkers and to the company.
Connect peers with purpose	The job of leaders is to provide good direction while pursuing its implementation through purposeful peer interaction and learning in relation to results.

Capacity building prevails	Capacity building entails leaders investing in the development of individual and collaborative efficacy of a whole group or system to accomplish significant improvements.
Learning is the work	Learning external to the job can represent a useful input, but if it is not in balance and in concert with learning in the setting in which you work, the learning will end up being superficial.
Transparency rules	Transparency can be abused, such as when results are used punitively, but there is no way that continuous improvement can occur without constant transparency fueled by good data.
Systems learn	People learn new things all the time, and their sense of meaning and their motivation are continually stimulated and deepened. (Fullan, 2008, 11-14)

Day 2 – Activity 6: Developing Lesson Plans:

Example

Subject:	Monday	Tuesday	Wednesday	Thursday	Friday
Literacy:	Lesson slides: Student Daily Objective:				
TD and EC Scaffolds or Extensions					
Skills/ALL Block					
Math:					
TD and EC Scaffolds or Extensions					
Sci/S.S.					

Day 2 – Activity 7: Exit Ticket and Daily Evaluation

Day 2 – Exit Ticket

<table>
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One Way I Can CONNECT today's lesson to my life is

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Day 2 - Daily Evaluation

Thank you for your participation in Day 2 PD Training Session of *Literacy – You Got This, Increasing Students' Achievement!* Your feedback will provide valuable information to improve future training sessions.

Reflection Questions

Please describe your role, position, and responsibility.

Did you obtain the intended knowledge and skills in the PD training?

Based on the morning and afternoon sessions, did you find any resources useful that will support balanced literacy training opportunities for your school?

[Empty text box]

I would have appreciated more time to extend my learning as it relates to the following topic or content in the course:

[Empty text box]

This learning opportunity will help me to be effective in my job.

[Empty text box]

I will apply today's learning and begin initial implementation at my job in the following manner:

[Empty text box]

Please offer comments related to your experience or to anything else regarding this professional development.

[Empty text box]

Activities Outlined for Day 3

Target Audience: ELA teachers and support staff personnel who are master BL teachers.
Setting: School conference room.
Purpose: To develop capacity building within Cityside School District using master teachers and support staff teams.
Morning of Day 3 Learning Outcomes: • Goal 6: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will model a lesson using the BL components through teacher teams.
Afternoon of Day 3 Learning Outcomes: • Goal 7: Develop cadres of ELA teachers and support staff personnel who are master BL teachers who will develop a plan for implementation of BL using the nine components with fidelity and interventions to support diverse learners' literacy needs.
Length of Activities: 8 hours
Materials Needed: • 7 oblong tables and 21 folding chairs • Basket of ink pens • Sign-in sheets • Name tags • Coffee, tea, juice • Door prizes • Candy for tables • Brochures on BL • Literacy data • Example lesson plans • Day 3 PowerPoint Presentation • Day 3 Evaluation forms to be handed out to participants • Handouts (BL components) • Laptops • Document camera • Overhead projector • Projection screen • Internet access • Speakers • Microphone • Promethean board/Smartboard • Post-it chart paper • Post-it notes

• Easel for post-it notes	
• Markers	
• Pencils	
• Big charts	
• Composition notebook for reflective journaling	
• Book: *This is Balanced Literacy, Grades K-6* (Fisher et al., 2014)	
• Exit tickets	
• Daily evaluation forms	
• Box for attendee evaluation form	

Evaluation:
- Attendees will leave their exit tickets sticky notes on a chart paper and Day 3 evaluation forms in designated box on tables before leaving the presentation.

Day 3 Professional Development: Literacy – You Got This, Increasing Students' Achievement!
Agenda

Agenda	
Time	Outline
8:30 a.m. – 8:45 a.m.	Participants arrive and get refreshments
8:45 a.m. – 9:30 a.m.	Day 3 Session PD –Training PPT slides below will be used throughout the Day 3 PD training. **Activity 1:** Recap Day 2 The facilitator will guide the following activities: Recap Day 2 Training: In your group, discuss one thing that you thought about this morning from yesterday's training that you would love taking back to someone at your school and why? What were some glows and grows from Day 2? The facilitator will discuss with the group the purpose of the BL PD training session, which is to develop capacity building within Cityside School District using master teachers and support staff teams.
9:30 a.m. – 10:00 a.m.	**Activity 2:** Train the Trainer (TTT) Model Present the TTT model, which is also called pyramidal training, triadic training, and helper model training.

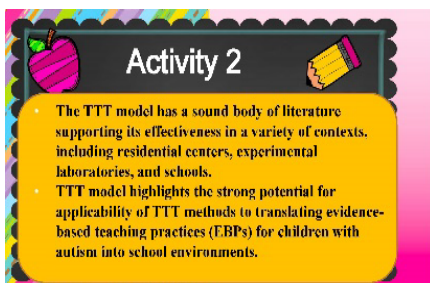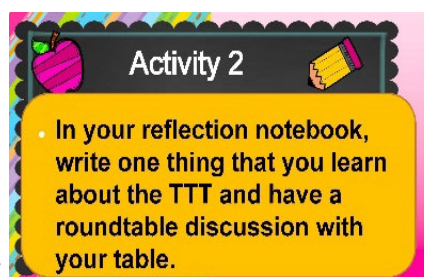|	
	(Suhrheinrich, 2011). The TTT model entails training an individual or multiple individuals who then train other individuals at the organization (Bennett, 2019; Suhrheinrich, 2011). The facilitator will explain: • The TTT model has a sound body of literature supporting its effectiveness in a variety of contexts, including residential centers, hospitals for the mentally disabled, experimental laboratories, and schools (Suhrheinrich, 2011). • The TTT model has been shown to be effective with trainees include teachers, parents, and university students (Bennett, 2019; Suhrheinrich, 2011). • Researchers have demonstrated the effectiveness of the TTT model and highlighted the strong potential for applicability of TTT methods to translating evidence-based practices (EBP) for children with autism into school environments (Suhrheinrich, 2011). In your reflection notebook, write one thing that you learned about the TTT model and have a roundtable discussion at your table. • The facilitator will allow 10 minutes for participants to discuss what they wrote in their reflection journals at their tables.
10:00 a.m. – 10:15 a.m.	Break
10:15 a.m. – 12:00 p.m.	**Activity 3:** Lesson Planning Using the TTT model, create lesson plans with other participants: • Write a lesson plan reflecting the BL components. • Facilitator will provide templates of the lesson plans. Lesson plans will be written on big sheets of paper for gallery walk.

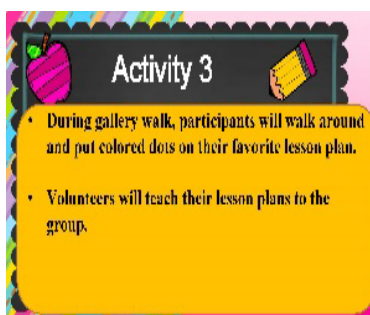|	
	During gallery walk, participants will walk around and put colored dots on their favorite lesson plan. Volunteers will teach their lesson plans to the group.
12:00 p.m. – 1:00 p.m.	Lunch
1:00 p.m. – 3:15 p.m.	**Activity 3 Continues:** Lesson Planning Using the TTT model, create lesson plans with other participants: • Write a lesson plan reflecting the BL components. • Facilitator will provide templates of the lesson plans. Lesson plans will be written on big sheets of paper for gallery walk. During gallery walk, participants will walk around and put colored dots on their favorite lesson plan. Volunteers will teach their lesson plans to the group.
3:15 p.m. – 3:30 p.m.	Break
3:30 p.m. – 4:30 p.m.	**Activity 4**: Complete Exit Ticket Parking Lot - One Way I Can CONNECT Today's Lesson to my Life is, Complete Daily Evaluation, and Complete Overall BL PD Evaluation. • The facilitator will recap Day 3 PD training. • Complete exit ticket Parking Lot - One way I can CONNECT today's lesson to my life is. • Once completed, please place your exit ticket sticky note on the Chart Paper, titled, Parking Lot! • The facilitator will distribute and discuss the evaluation form, its' purpose for future training sessions, and give time for participants to fill out their forms, *Literacy – You Got This, Increasing Students' Achievement! Professional Development Training Session Evaluation*. • Complete daily evaluation form. • Complete overall BL PD evaluation form.

	• Attendees will leave their Day 2 evaluation forms in designated box on tables before leaving the presentation. **Day 3 PPT Slides Below**

Day 3 Session PD PowerPoint

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Slide 2

Slide 3

Slide 4

Slide 5

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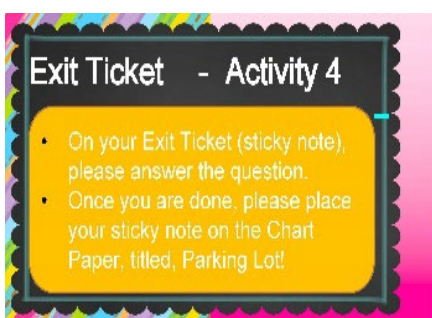Slide 10

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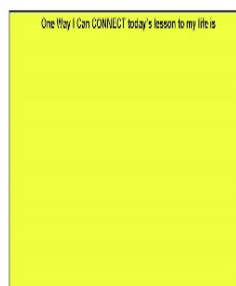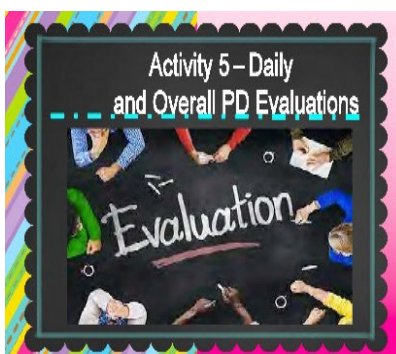

Slide 13

Slide 14

Slide 15

Slide 16

Slide 17

Slide 18

Slide 19

Day 2 −Activity 2: TTT Model

TTT Model

- The TTT model has a sound body of literature supporting its effectiveness in a variety of contexts, including residential centers, hospitals for the mentally disabled, experimental laboratories, and schools (Suhrheinrich, 2011).
- The TTT model has been shown to be effective with trainees include teachers, parents, and university students (Bennett, 2019; Suhrheinrich, 2011).
- Researchers have demonstrated the effectiveness of the TTT model and highlighted the strong potential for applicability of TTT methods to translating

evidence-based practices (EBP) for children with autism into school
environments (Suhrheinrich, 2011).

Day 3 – Activity 3: Lesson Planning:

Example

Subject:	Monday	Tuesday	Wednesday	Thursday	Friday
Literacy:	Lesson slides: Student Daily Objective:				
TD and EC Scaffolds or Extensions					
Skills/ALL Block					
Math:					
TD and EC Scaffolds or Extensions					
Sci/S.S.					

Day 3 - Activity 4: Exit Ticket

> **One Way I Can CONNECT today's lesson to my life is**

Day 3 - Activity 5: Daily Evaluation and Overall PD Evaluation

Day 3 - Daily Evaluation

Thank you for your participation in Day 2 PD Training Session of *Literacy – You Got This, Increasing Students' Achievement!* Your feedback will provide valuable information to improve future training sessions.

Reflection Questions

Please describe your role, position, and responsibility.

Did you obtain the intended knowledge and skills in the PD training?

> [blank box]

Based on the morning and afternoon sessions, did you find any resources useful that will support balanced literacy training opportunities for your school?

> [blank box]

I would have appreciated more time to extend my learning as it relates to the following topic or content in the course:

> [blank box]

This learning opportunity will help me to be effective in my job.

> [blank box]

I will apply today's learning and begin initial implementation at my job in the following manner:

> [blank box]

Please offer comments related to your experience or to anything else regarding this professional development.

> [blank box]

Day 3 – Activity 5: Overall BL PD Evaluation

To be completed by ALL PD participants. Please respond to each question.

1. What was the most helpful aspect of the BL PD process?

2. What was the most helpful aspect of the BL PD content?

3. What aspect of the BL PD was least helpful?

4. I would like to know more about . . . .

5. Questions, Comments, Concerns . . . .

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Appendix B: Permission to Use, Adapt, and Reprint Formula for Success, Linking the

Formula for Success With the Active Implementation Frameworks, and Linked

Implementation Teams

From: NIRN <email address redacted>
Sent: Tuesday, September 11, 2018 9:36 AM
To: Shalonda Young
Subject: Re: Requesting Permission to Use Three Figures

Good afternoon Mrs. Young,

Permission is granted to use the three figures with the attributions you have included in the Word document. In case you would prefer to use the current versions of the figures, I have attached a PowerPoint file with those current figures and the attribution information for them.

Sincerely,
Amelia Krysinski

From: Shalonda Young <email address redacted>
Date: Saturday, September 8, 2018 at 12:28 PM
To: NIRN <email address redacted>
Subject: Requesting Permission to Use Three Figures

Mrs. Shalonda Young
Phone number redacted
E-mail address redacted

September 6, 2018

Ms. Amelia Krysinski
National Implementation Research Network (NIRN)
email address redacted

Dear Ms. Krysinski,

My name is Shalonda Young and I had previously contacted NIRN and obtained permission to use, adapt, and reprint the Active Implementation Frameworks. There are three other figures that I also requesting permission to use, adapt, and reprint as well. I originally sent the permission request to Ms. Barbara A. Wilson at the Wilson Language

Training. Mr. Diego Almansa Camacho, the Intellectual Property Monitor and Legal Administrator from Wilson Language Training informed me that "The graphics subject to your permission were used and modified by Wilson Language Training with permission from the original creator, the National Implementation Research Network NIRM (https://nirn.fpg.unc.edu/). Therefore, we are unable to provide further permission. If you do not want to assume your use is permissible as a fair use, you could contact NIRN directly."

Therefore, I am contact NIRN directly and requesting permission to use, adapt, and reprint your Formula for Success figure, the Linking the Formula for Success with the Active Implementation Frameworks figure, and Linked Implementation Teams figure from the article, titled, *Using Implementation Science to Close the Policy to Practice Gap*, by Michelle J. Duda and Barbara A. Wilson, in 2015, Literate Nation White Paper. My dissertation is titled, *Fidelity of Implementation of a Balanced Literacy Program in the Elementary Classroom*. I have attached a copy of the figures as well as the authors' White Paper. Thank you again for your time and consideration.

Sincerely,
Shalonda Young
Phone number redacted
E-mail address redacted

Appendix C: Permission to Use, Adapt, and Reprint Active Implementation Frameworks

From: NIRN <email address redacted>
Sent: Tuesday, July 31, 2018 10:17 AM
To: Shalonda Young
Subject: Re: Permission to Use Figures in My Dissertation

Good afternoon Ms. Young,

Permission is granted for you to use the figure for your dissertation. Please use this text for attribution below the figure:

Active implementation frameworks. Adapted from "Module 1: An Overview of Active Implementation Frameworks," by National Implementation Research Network, University of North Carolina at Chapel Hill, 2017, Retrieved from http://implementation.fpg.unc.edu/module-1. Copyright 2013-2018 Allison Metz, Dean Fixsen and Karen Blase. Adapted with permission.

We wish you the best with your dissertation!

Sincerely,
Amelia

From: Shalonda Young <email address redacted>
Date: Tuesday, July 31, 2018 at 10:57 AM
To: NIRN <email address redacted
Cc: Shalonda Young <e-mail address redacted>
Subject: Re: Permission to Use Figures in My Dissertation

Good Evening Ms. Krysinski,
Thank you for responding to my permission request. Attached is the figure to show how it will be adapted and reprinted in my dissertation. Thank you again for your time and consideration.
Sincerely,
Shalonda Young
Phone Number Redacted
E-Mail Address Redacted

From: NIRN <email address redacted>
Sent: Friday, July 27, 2018 11:00 AM
To: Shalonda Young
Subject: Re: Permission to Use Figures in my Dissertation

Good afternoon Mrs. Young,

Thank you for contacting us. We are glad you see an opportunity to build on NIRN work in your dissertation. NIRN makes determination on altering and repurposing content on a case by case basis. Could you send us a copy of the adapted content for quick review?

Thanks in advance.

Sincerely,
Amelia Krysinski

From: Shalonda Young <e-mail address redacted>
Date: Tuesday, July 24, 2018 at 6:13 PM
To: "Constant Contact Account Login Info sisep@unc.edu" <email address redacted
Cc: Shalonda Young <e-mail address redacted>
Subject: Permission to Use Figures in my Dissertation

Mrs. Shalonda Young
Phone Number Redacted
E-Mail Address Redacted

July 21, 2018

State Implementation and Scaling-up of Evidence-based Practices Center (SISEP) and the National Implementation Research Network (NIRN)
The University of North Carolina at Chapel Hill's FPG Child Development Institute
email address redacted

Good Day National Implementation Research Network,

My name is Shalonda Young and I am a doctoral student at Walden University. I am completing my dissertation, titled, *Fidelity of Implementation of a Balanced Literacy Program in the Elementary Classroom*. I am writing to ask you permission to use, adapt, and reprint your Active Implementation Frameworks figure from your website, titled, *Module 1: An Overview of Active Implementation Frameworks*, at the following

link: https://implementation.fpg.unc.edu/module-1. Thank you for your time and consideration.

Sincerely,
Shalonda Young
Phone Number Redacted
E-Mail Address Redacted