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Educators' Experiences With Structured Word Inquiry for Spelling Underachievement in K–8 Students

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Walden University

College of Education and Human Sciences

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Leah Skinner

has been found to be complete and satisfactory in all respects,
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Walden University
2026

Abstract

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K–8 Students

by

Leah Skinner

MA, Fitchburg State University, 2018

BSc, University of Regina, 1994

Dissertation Submitted in Fulfillment of the Degree of

Doctor of Education

Reading, Literacy and Assessment

Walden University

May 2026

Abstract

The problem addressed in this basic qualitative study was that K–8 students in the western United States continue to experience spelling underachievement despite structured literacy interventions. Grounded in Bowers and Kirby’s structured word inquiry (SWI) framework, the purpose of this study was to explore educators’ experiences implementing SWI for spelling instruction with K–8 students in the western United States. Data were collected through semistructured interviews with 16 K–8 educators with SWI experience who were selected through purposive and snowball sampling. Thematic analysis using open and axial coding resulted in six themes. Findings indicated that educators perceived SWI as an effective, meaning-centered approach that improved spelling accuracy, increased student engagement, and supported broader literacy development. Findings also highlighted the importance of professional development, instructional support, and ongoing assessment for successful implementation. The positive social change implications from this study include literacy advancement for students along with providing evidence-informed approaches for policymakers and curriculum developers.

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Chapter 1: Introduction to the Study

Spelling difficulties are a widespread issue among K–8 students at a private school in the western United States, with approximately 70% of students struggling when assessed through structured literacy interventions. Research indicates that 3-11% of children and adolescents experience reading and/or spelling disorders which can significantly hinder academic performance (Galuschka et al., 2020; Toffalini et al., 2021). Poor spelling skills can negatively affect a learner’s self-esteem, mental well-being, and academic performance (Polychroni et al., 2024). Repeated academic struggles may lead to fear of failure, self-doubt, and even anxiety disorders (Downing et al., 2020). Systematic instruction focusing on letter-sound relationships, syllable-morpheme synthesis, and sound analysis is essential for reinforcing spelling skills to prevent these negative effects (McMurray, 2020). Effective spelling instruction not only strengthens literacy skills but also fosters a positive learning mindset (Daffern, 2022). Studies show that students consistently improve their spelling abilities with structured, evidence-based instruction (Giazitzidou et al., 2024). Educators in Sacramento may help students overcome spelling challenges, enhance literacy development, and build academic confidence by integrating evidence-based instruction into the curriculum.

A significant portion of K–8 students in the western United States continue to struggle with spelling despite the implementation of a structured literacy intervention program (Sacramento Literacy Program, 2024). Spelling is a critical milestone in a child’s literacy development as it directly affects reading comprehension, written communication, and overall academic performance (Gath et al., 2025; Gillon et al., 2024; McNeill et al., 2023; Tortorelli & Bruner, 2022). However, traditional phonics-based interventions may not be effective for all

learners, particularly those facing persistent reading challenges (Galuschka et al., 2020).

Structured word inquiry (SWI) is a morphology-based instructional approach that offers an alternative that may better support spelling development. This study is designed to examine educators' implementation of the SWI method to assess its use, effectiveness, and areas for improvement. Findings from this research could help refine spelling instruction strategies and contribute to more effective literacy interventions for struggling students. The potential positive social change implications include enhancing educational practices to better support learners who struggle with spelling, thereby improving literacy outcomes for students in the western United States. Equipping educators with evidence-based instructional interventions may lead to more effective teaching and foster a more inclusive and supportive learning environment (Pan et al., 2021). Improved spelling skills among learners can boost their confidence, academic performance, and long-term career opportunities (Benedict et al., 2025). Exploring the implementation of SWI has the potential to not only enhance spelling instruction for students with persistent literacy challenges but also to promote long-term academic success and equity through informed, research-based teaching practices.

Chapter 1 introduces the study's topic and establishes a comprehensive foundation for understanding its objectives, rationale, and methodological approach. The chapter is divided into 13 sections: an introduction, background of the study, problem statement, purpose of the study, research questions, conceptual framework, nature of the study, definitions of keywords, assumptions, scope and delimitations, limitations, significance, and a summary of the chapter. These sections provide a structured approach to introducing the research and ensure clarity in its

purpose, scope, and methodology. This chapter lays the groundwork for the in-depth exploration that follows in later chapters.

Background

Spelling plays a critical role in literacy development and remains a complex skill for many students to master due to the intricate interplay of linguistic, cognitive, and instructional factors. Spelling is one of the most challenging aspects of early learning because it requires integrating multiple linguistic components, including morphology, phonology, and orthography (Daffern, 2022). Unlike spoken language, which is naturally acquired, spelling requires explicit instruction and deliberate practice for mastery (Panda et al., 2023). One major challenge in English spelling is the inconsistency of letter-sound correspondence with many words not following straightforward phonetic rules (Martin et al., 2020). Additionally, spelling proficiency is influenced by cognitive factors such as memory, vocabulary knowledge, and exposure to print (Niolaki et al., 2020). Students in K–8 grades may struggle with both reading and writing with ineffective instructional strategies hindering their academic development (Sandra, 2022). Ensuring that students receive structured and evidence-based spelling instruction is essential for building strong literacy skills and supporting their overall educational success.

In the western United States, 70% of K–8 students in a private school are struggling with spelling skills as assessed through structured literacy interventions. These findings indicate consistent difficulties in phonemic awareness (PA), letter-sound correspondence, and the application of spelling rules in written work (van den Boer & Bree, 2023). Educators have observed that many students over-rely on phonetic spelling strategies leading to frequent errors with irregular words and complex spelling patterns (Niolaki et al., 2020). Such findings highlight

the need for targeted instructional approaches that go beyond phonics-based methods to strengthen literacy skills and overall academic achievement. Implementing evidence-based spelling instruction can help address spelling challenges and support students in developing more accurate and automatic spelling skills.

Understanding the role of morphology in literacy development is essential as it provides a foundation for how students learn to decode, spell, and derive meaning from complex words. Morphology is the study of how the smallest meaningful units (morphemes) combine to form words and plays a crucial role in spelling acquisition (Gwilliams, 2020). Learning to read requires students to connect written words to their phonological forms and meanings through a process that can be gradual and cognitively demanding. (Georgiou et al., 2020; Silinskas et al., 2021). However, students can develop word recognition skills more rapidly with consistent instruction and practice (Levesque & Deacon, 2022). Explicit morphological instruction has been shown to enhance spelling skills by helping learners understand word formation, recognize patterns, and apply rules more effectively (Georgiou et al., 2022). Integrating morphology-based teaching strategies into literacy instruction may deepen students' understanding of spelling patterns and improve their overall reading and writing proficiency.

As educators seek effective strategies to support students with persistent spelling difficulties, SWI offers a research-informed approach that integrates linguistic understanding with explicit instruction to promote deeper and more lasting learning. SWI is a morphology-based instructional method that helps learners understand spelling by exploring the interrelationship of morphology, etymology, orthography, and phonology (Bowers, 2021). Research has shown that this approach is particularly effective in enhancing vocabulary skills for

students who struggle with reading (Georgiou et al., 2021). Teaching spelling involves more than simply instructing students on one-to-one letter-sound correspondences (Ardanouy et al., 2024). Students must progress from recognizing individual letters to understanding patterns to understanding the meaning behind words (Iaia et al., 2022). Structured approaches like SWI are valuable in supporting spelling acquisition because the transition can be particularly challenging (Georgiou et al., 2020). SWI has been shown to improve memory and retention through an elaborative and organized learning process by helping learners recognize common base words and their connections (Ng et al., 2022). This study explored educators' implementation of SWI for spelling development among K–8 students in the western United States and provided insight into its effectiveness and areas for improvement.

Understanding educators' experiences with SWI is essential for identifying both the instructional strengths and implementation barriers of this approach and how it relates to supporting students with diverse spelling needs. Existing literature on educators' perceptions of SWI highlights its benefits and challenges (Benedict et al., 2020; Daffern, 2022). Benedict et al. (2020) found that implementing SWI significantly improved educators' understanding of word study instruction and their ability to apply strategies effectively across different instructional levels. Similarly, Daffern and Mackenzie (2020) noted that while educators acknowledged the importance of using appropriate spelling strategies, many struggled to provide adequate support for students with spelling difficulties. Research also indicates that well-defined, evidence-based instructional practices enhance educators' effectiveness in teaching spelling (Chamalaun et al., 2021; Tortorelli & Bruner, 2022). Kuperman et al. (2021) emphasized the need for precise spelling strategies that align with SWI principles and suggested that these strategies should be

reinforced through professional development (PD) and instructional resources. There is a clear need for comprehensive training and ongoing support for educators to strengthen their ability to implement effective spelling instruction within the SWI framework. Addressing these challenges can help maximize the potential benefits of SWI to ensure that students receive high-quality, research-based spelling instruction.

A deeper understanding of how educators implemented SWI for spelling development in K–8 students in the western United States provided valuable insights into effective instructional strategies and their impact on literacy outcomes. Examining these practices helped identify the best approaches for teaching spelling to ensure that students receive the support they need to develop strong foundational literacy skills. Such knowledge also informed PD programs to equip educators with the necessary skills and resources to effectively support students with spelling difficulties. Strengthening SWI-based instruction has the potential to enhance spelling proficiency and reading skills and contribute to improved academic achievement among learners. Refining instructional practices can help educators create more effective, research-driven approaches to spelling instruction that benefit all students.

Problem Statement

The problem addressed in this basic qualitative research study is that K–8 students in the western United States continue to struggle with spelling underachievement despite the implementation of structured literacy interventions. English is considered an opaque orthography and mastering its alphabetic principles is particularly challenging (Salas, 2020). Unlike transparent orthographies where letter-sound correspondences are consistent, English requires many words to be stored as whole-word representations for accurate spelling because they

cannot be easily sounded out (Reyes-Giordano & Fienup, 2023). Students with spelling difficulties often experience inefficiencies in retrieving stored words compounded by visual-perceptual anomalies that lead them to juxtapose symbols, letters, and words (Pan et al., 2021). These challenges make whole-word memorization particularly difficult and hinder the development of strong spelling skills. Understanding the barriers is essential for refining instructional approaches and ensuring that structured literacy interventions effectively address the diverse needs of struggling spellers.

Spelling difficulties can significantly affect the writing abilities of struggling readers. Graham et al. (2021) found that students with reading challenges often exhibit increased spelling errors which hindered their written communication. Learners with spelling underachievement can become proficient readers but they frequently continue to struggle with spelling which affects their ability to express ideas in writing (Afonso et al., 2022). The difficulties arise from challenges in recalling spelling rules and patterns, leading to a reliance on sight-word recognition rather than understanding spelling structures (Bowers, 2021). Research suggests that effective spelling instruction should incorporate phonics, morphology, etymology, and orthography to help students grasp the complexity of the English language (Levesque et al., 2021). However, there remains a N/A in research on how best to teach these components to improve overall spelling skills (Bowers, 2021). Examining educators' experiences with SWI provided valuable insights into effective instructional practices that better support K–8 students who struggle with spelling. Understanding the best practices can contribute to the development of more comprehensive and effective literacy interventions.

Purpose of the Study

The purpose of this qualitative study was to explore educators' experiences with implementing SWI for spelling instruction in K–8 students in the western United States. The study focused on how SWI was used to develop spelling skills and on educators' approaches to integrating it into their instructional practices. The research was guided by a constructivist research paradigm to understand how educators experience and perceive the use of SWI in their classrooms. A qualitative approach was used to examine the challenges, benefits, and instructional strategies associated with SWI implementation. The conceptual framework of SWI provided a lens for analyzing how educators engage with the morphological and etymological aspects of spelling to support student success.

SWI is a structured instructional approach that extends beyond phonics by incorporating morphology, orthography, and etymology to explain grapheme choices (Bowers, 2021). It employs instructional tools such as matrices and word sums to establish connections between morphology and phonology to help students develop a deeper understanding of word structure (Georgiou et al., 2020). More research is needed to evaluate SWI's effectiveness in enhancing spelling and reading abilities among students in the western United States. This study contributes to the growing body of knowledge by providing insights into how educators implement SWI in their instruction.

Research Question

A single research question addressed the study's stated problem. The research question is as follows.

RQ. What are educators' experiences with SWI for addressing spelling underachievement with K–8 students?

Conceptual Framework

The framework used to inform the research problem, purpose, and methodological decisions is SWI. SWI was developed by Pete Bowers and John Kirby (2010). They believed that English literacy instruction should give words meaning through the basic principles of English orthography (Bowers & Kirby, 2010). They also believed that students could find ordered spelling and meaning cues in words through the morphological study of irregular words (Bowers & Kirby, 2010). SWI is a discovery-based approach to learning spelling patterns and rules that emphasizes morphology, etymology, orthography, and phonology (Colenbrander et al., 2021). SWI encourages students to analyze and explore the structure of the English language, using their existing knowledge base to develop a deeper understanding of written language (Hastings & Trexler, 2021). Bowers (2021) explains that SWI promotes learner-driven exploration by guiding students in discovering word origins, meanings, rules, and patterns to improve spelling skills. Students can independently engage with words that challenge retention by identifying areas of difficulty and reinforcing learning through repetition, discovery, and trial-and-error. SWI provides educators with strategies to explicitly teach the spelling of irregular words while also helping students understand the logic behind orthographic rules and structures (Bazis et al., 2022; Graham et al., 2021; Murphy & Diehm, 2020). Educators may offer a more structured and meaningful approach to spelling by applying SWI during instruction, potentially improving spelling proficiency and overall literacy skills among students.

As educators seek more effective ways to support students with persistent spelling difficulties, SWI offers an alternative to traditional phonics-based instruction by emphasizing meaning-based word analysis and integrated linguistic knowledge. SWI has been shown to positively impact the morphological awareness (MA) of both typically developing students and those with persistent reading difficulties (Devonshire & Fluck, 2010; Georgiou et al., 2021). SWI takes a discovery-based approach to spelling and integrates morphology, etymology, orthography, and phonology (Bowers, 2021). SWI allows students to break words down into their smallest meaningful units to help them recognize spelling patterns and the rules that govern them. SWI is particularly useful in English because it is a language with a complex orthographic system where many words cannot be easily decoded through phonics alone (Devonshire et al., 2013). Investigating educators' experiences with SWI provided valuable insights into how this method supports spelling instruction beyond rote memorization. Educators' firsthand experiences offered important perspectives on whether SWI effectively improved spelling proficiency for students who have struggled with traditional instructional methods. Understanding these insights can help refine teaching strategies and contribute to more effective literacy interventions.

Nature of the Study

This study examined the implementation of SWI as a method for developing spelling skills in K–8 students. SWI is a linguistically grounded approach that focuses on morphology, etymology, orthography, and phonology to help students understand word structure (Bowers, 2021). A qualitative research approach was well-suited to this study, as it enabled an in-depth exploration of educators' perspectives, instructional practices, and perceived challenges related to SWI integration and implementation. The qualitative research approach involved collecting

non-numerical data to understand participants' experiences, perceptions, and behaviors (Lim, 2024). This methodology was particularly useful for answering what, how, and why questions (Taherdoost, 2022). A qualitative research study provided the most appropriate framework for gaining meaningful insights into educators' experiences with SWI. The study contributed to a deeper understanding of how SWI is applied in instruction and its effectiveness in enhancing spelling instruction. This study employed a basic qualitative research design to explore educators' experiences with SWI. This approach was appropriate because it focused on understanding personal experiences rather than measuring outcomes or testing hypotheses. A basic qualitative research design is well-suited to studies seeking to capture rich, descriptive data through direct engagement with participants (Lim, 2024). The design aligns with the study's goal of describing and exploring how educators implement SWI in their classrooms. The research provided in-depth insights into instructional practices, challenges, and perceptions, contributing to a broader understanding of SWI's role in spelling instruction.

The study used primary data sources to ensure a comprehensive and rigorous data collection process. The data were collected through researcher-developed semistructured interviews, which allowed for an in-depth exploration of educators' experiences with SWI. The target population consisted of K–8 educators in the western United States who have incorporated SWI into their teaching practices. A purposive sampling technique was used to select 16 participants from this group. Recruitment took place through social media outreach, professional associations, schools, and recommendations from other professionals familiar with SWI strategies. This approach ensured that participants had relevant experience and could provide

meaningful insights into the implementation and effectiveness of SWI in their instructional settings.

The inclusion criteria for this study required participants to be current K–8 educators in the western United States who actively use SWI in their instructional practices. Data collection continued until data saturation was reached, at which point no new themes emerged from the interviews (Braun & Clarke, 2022). Following Christou's (2022) guidelines for thematic analysis, key themes were identified and categorized. Atlas.ti software assisted with coding and organizing the data. Such an approach allowed for a comprehensive analysis of educators' experiences with SWI and provided valuable insights into its effectiveness in spelling instruction.

Definitions

Etymology: Etymology is the study of the origins and evolution in the meaning of a word (Zwart, 2021).

Grapheme: A grapheme is the smallest functional unit in written language that represents a sound and serves as a bridge between how a word is written and how it is spoken (Yeung & Savage, 2020).

Morphology: Morphology is the study of the structure of words, focusing on how the smallest meaningful units (morphemes) are combined to form words. (Gwilliams, 2020).

Orthography: Orthography is the system of rules that govern how a language is written (Bahr et al., 2020).

Phoneme: Phonemes are the smallest unit of sound that distinguishes one word from another (Stanlaw, 2020).

Phonics: Phonics is a method of understanding reading that center on the relationship between letters and sounds (Fletcher et al., 2021).

Phonology: Phonology is the study of how sounds are organized in a language and how the sounds convey meaning (Vihman et al., 2023).

Structured word inquiry (SWI): SWI is a new literacy instruction method that differs from traditional phonics-based approaches by emphasizing the morphology, etymology, orthography, and phonology of spelling (Bowers, 2021).

Assumptions

One of the primary assumptions in this study was that participants provided accurate and truthful accounts of their experiences with SWI implementation. This assumption is essential because conducting research without trusting participants to be honest and accurate would undermine the validity of the findings. Another key assumption was that the interview questions developed for this study effectively addressed the research question and provided a comprehensive exploration of educators' experiences with SWI. The study would not yield meaningful insights into SWI implementation and educator perceptions if this assumption were not made. Additionally, it was assumed that the recruited K–8 educators had sufficient experience with SWI to offer deep and relevant insights into its implementation. This assumption is necessary because the quality of the data and findings depended on participants providing detailed and reliable information. A final assumption was that participants would be available and willing to take part in the study. Without adequate participation, the research could not proceed as there would not have been enough data to draw meaningful conclusions. These

assumptions collectively support the feasibility and effectiveness of the study in exploring SWI implementation among K–8 educators.

Scope and Delimitations

This research focused exclusively on educators' experiences implementing SWI in K–8 instruction. No other literacy approaches were examined. The primary goal was to explore how educators integrate SWI into their instructional methods, the challenges they face, and the perceived benefits of using this approach. Data were collected from K–8 educators in the western United States with at least some experience with SWI. Educators who do not actively use SWI in their instruction were excluded from the study. Additionally, the research was geographically limited to the western United States, meaning educators' experiences from other regions were not considered. This restriction may limit the transferability of the findings to broader educational contexts. However, the study ensured a focused, in-depth exploration of SWI implementation by narrowing its scope.

Limitations

A significant limitation of this study is its transferability. The findings were limited to a single geographic region in the western United States and may not be applicable to areas with different demographic characteristics. Using a single conceptual framework, SWI limited my potential for broader insights with alternative spelling instruction strategies. The study focused solely on educators' experiences, without assessing SWI's impact on learning outcomes, thereby limiting the depth of understanding of its effectiveness. Purposive sampling also limited the diversity of perspectives and the transferability of the findings, as participants were recruited based on specific characteristics rather than targeting the broader population of K–8 educators in

the western United States. To address the transferability challenges, I described the research setting, participants, participant selection logic and procedures, data collection processes, and data analysis procedures.

Researcher bias is another limitation to consider. Researcher bias refers to the likelihood of an investigator's personal beliefs or perspectives influencing the research process (Baldwin et al., 2022). To address this challenge, I maintained an objective stance and remained neutral. I also incorporated audit trails and journaling to manage potential researcher bias.

Social desirability bias was also a negative factor. Social desirability bias refers to the tendency for participants to alter their responses to portray themselves in a more positive light to peers, colleagues, or the interviewer (Bispo Júnior, 2022). Examples of social desirability bias in the current study included overstating successes with SWI or minimizing challenges. This challenge was mitigated by framing interview questions neutrally and assuring participants that their responses would be kept confidential and anonymous, thereby encouraging more honest responses.

Significance

The significance of this study lies in its ability to address the gap in the literature regarding ongoing spelling deficits among K–8 learners in the western United States. SWI demonstrated practical applications in reducing spelling challenges among students by underscoring the need for ongoing collaboration and PD (Bowers, 2021). The results indicated the need to equip educators with knowledge about SWI (Tortorelli & Bruner, 2022). Enhancing students' spelling abilities in K–8 can be essential for positive social change by helping learners advance their language skills. By addressing the gap in practice, underachieving learners can be

empowered with the tools they need to succeed academically and thrive socially (Pan et al., 2021). The improvement in understanding orthography that emerged from this study, alongside strategies to support learners with spelling difficulties, may lead to a more inclusive and equitable society in educational attainment and career opportunities.

Summary

At least 70% of K–8 students in a private school in Sacramento are struggling with spelling when assessed using structured literacy interventions. Effective spelling instruction can enhance literacy skills and foster a positive attitude toward learning. Educators can support K–8 students in overcoming spelling challenges by integrating evidence-based strategies into the curriculum. SWI is a specific method of morphology-based instruction that helps learners make sense of spelling by understanding that spellings are organized around the interrelationship of morphology, etymology, orthography, and phonology.

The purpose of this qualitative study was to explore educators' experiences with implementing SWI for spelling skills with K–8 students in the western United States. A single research question addressed the study's research problem. SWI served as the framework for the research problem, purpose, and methodology. A basic qualitative research design was used. Researcher-developed semistructured interviews were the primary data collection method. The target population was K–8 educators in the western United States who have incorporated SWI into their teaching practice. A purposive sampling technique recruited 16 participants from this group. The primary assumption in this study was that the respondents would provide accurate and truthful information regarding their experiences with SWI implementation. This study was limited by reduced transferability, potential researcher bias, and social desirability bias. By

bridging the gap between literature and practice, educators and underachieving learners can be equipped with the necessary tools to achieve more effective spelling outcomes. In Chapter 2, a detailed literature review is presented.

Chapter 2: Literature Review

Introduction

The problem addressed in this basic qualitative research study is that K–8 students in the western United States continue to struggle with spelling underachievement despite implementing structured literacy interventions. This study examined how educators implement SWI to support spelling development in K–8 students across the western United States. Research demonstrates that SWI enhances students' participation and comprehension by emphasizing structural relationships within words (Georgiou et al, 2021). Bowers (2022) found that morphological matrices and word sums help students connect meaning to spelling and reduce confusion about irregular words. Hastings and Trexler (2021) argued that SWI fosters an inquiry-based classroom environment where students actively investigate linguistic features and promote deeper engagement and understanding. Moreover, the inquiry-based nature of SWI challenges traditional educator-student dynamics, encouraging students to take ownership of their literacy learning (Hastings & Trexler, 2021). By exploring educators' implementation of SWI, this study provides insights into how inquiry-based, linguistically informed instruction effectively addresses persistent spelling difficulties and supports meaningful literacy growth among K–8 students.

A growing body of evidence suggests that SWI not only improves literacy skills but also cultivates critical thinking. Bowers (2022) emphasized the role of morphological-phonological connections in vocabulary development, while Hastings and Trexler (2021) proposed that SWI fosters a "critical literacy framework" that encourages students to explore overlooked aspects of language. Despite these benefits, implementation challenges persist, such as the need for PD to

equip educators with SWI-based instructional strategies (Hastings & Trexler, 2021).

Understanding both the benefits and implementation challenges of SWI is essential for informing PD efforts and ensuring that educators are equipped to use this approach effectively to enhance students' literacy and critical thinking skills.

Chapter 2 included a detailed exploration of the historical context and development of SWI by examining the evolution of spelling instruction and contrasting phonics-based methods with morphology-focused approaches, and by highlighting the advantages of integrating multiple linguistic elements in literacy instruction. Next, Chapter 2 examined the effectiveness of SWI in enhancing spelling skills and explored the role of phonological, etymological, orthographic, and morphological knowledge in spelling development. Educators' perceptions and implementation of SWI were explored to examine its challenges and benefits, with a focus on instructional coherence and PD needs. The importance of structured policies and research-practice partnerships is highlighted. SWI and student learning outcomes analyzed the impact of SWI on students' spelling confidence and literacy skills. The intersection of reading and spelling skills was also explored. The role of technology in supporting SWI was reviewed in studies demonstrating how digital tools enhance SWI-based learning to illustrate how technology facilitates linguistic inquiry and spelling instruction. A comparison of SWI with phonics-based approaches explored the interplay of morphological, phonological, and cognitive factors in spelling instruction. Finally, implications for instruction and policy synthesized key findings and discussed practical recommendations for integrating SWI into literacy curricula. Research-driven approaches and culturally responsive practices were emphasized to ensure effective implementation. In doing so, Chapter 2 contributes to ongoing discussions on literacy instruction

by examining the effectiveness of SWI and offering evidence-based recommendations for educators and policymakers seeking to enhance spelling education through a structured, inquiry-based approach.

Literature Search Strategy

A literature search was conducted to identify research on educators' perceptions of SWI to enhance the spelling abilities of K–8 students in the western United States. Several academic databases were used in the present study, including OASIS, PubMed, JOSTR, EBSCO, ERIC, ProQuest, Scopus, and Google Scholar, with an emphasis placed on identifying the most recent and relevant studies. The focus was on articles published in the last 5 years and accounted for more than 75% of the articles analyzed.

Specific search terms and phrases such as SWI, spelling instruction, educator experiences, morphological awareness, reading interventions, PA, literacy development, structured literacy, and spelling skills were used to focus the search. Boolean operators such as and, or, and not were used to filter outcomes and identify the most relevant studies on SWI and its implementation in elementary and middle school contexts. Chapter 2 covers the conceptual framework behind the following topics: introduction to SWI, historical context and development of SWI, the effectiveness of SWI in enhancing spelling skills, educators' perceptions and implementation of SWI, student learning outcomes, the role of technology in supporting SWI, comparison of SWI with other spelling interventions, incorporating research-based practices in the classroom, and a summary of the literature reviewed.

Conceptual Framework

Pete Bowers and John Kirby pioneered SWI as an inquiry-based teaching and learning approach that emphasizes spelling, with an emphasis on morphology, etymology, orthography, and phonology (Bowers & Kirby, 2010). SWI has also been shown to increase vocabulary skills in students who are at the expected rate of development in fourth and fifth grades (Bowers & Kirby, 2010), spelling skills in students in third and fourth grades (Devonshire & Fluck, 2010), and decoding skills for students in first and second grades (Devonshire et al., 2013). In a more recent study, SWI was also found to have a positive effect on reading and MA for students identified as having persistent reading difficulties when trained research assistants delivered instruction (Georgiou et al., 2021). However, no systematic review has examined the effectiveness of SWI in increasing students' literacy skills, such as reading, spelling, comprehension, and vocabulary knowledge, among students with reading and spelling disorders. There remains a need for a systematic review to evaluate the overall effectiveness of SWI in improving literacy outcomes, particularly for students with diagnosed reading and spelling disorders.

SWI offers an alternative approach to traditional phonics instruction by emphasizing the meaningful structure of words. SWI is a structured instructional approach that goes beyond phonics by using morphology and etymology to explain grapheme choices (Bowers, 2021). It employs matrices and word sums to connect morphology and phonology (Bowers, 2021). A study comparing SWI to another phonics-based intervention, termed the Simplicity intervention, found that both methods significantly improved reading abilities in persistently struggling third-grade readers with medium to large effect sizes in word reading and morphological relatedness

(Georgiou et al., 2020). However, neither program was a comprehensive solution as some children continued to face difficulties after the intervention (Georgiou et al., 2020). While the effectiveness of systematic phonics in early reading instruction remains debated (Hudson et al., 2021), SWI is considered a theoretically sound alternative (Bowers & Bowers, 2021). The debate over SWI and phonics-based approaches continues with advocates calling for further research into SWI's effectiveness across different ages and learning abilities (Bowers, 2022). As interest in SWI increases, continued research is needed to clarify its comparative effectiveness and potential as a scalable, evidence-based intervention for diverse learners across developmental stages.

A deeper understanding of how educators implement SWI in real-world classrooms can help determine its practical effectiveness in addressing persistent spelling difficulties that may not be fully resolved through phonics-based instruction alone. Bowers and Bowers (2021) and Georgiou et al. (2020) provided varying views of SWI as a method of teaching reading. Georgiou et al. found that both SWI and a phonics-based intervention improved certain reading skills in struggling third-grade students, particularly in their understanding of morphological relatedness. Bowers and Bowers (2021) contended that systematic phonics has minimal scientific backing and defended SWI by suggesting that one must consider other approaches than phonics alone. It would be important to understand how educators implement SWI to improve spelling skills, given that students have difficulty spelling, as determined by Structured Literacy intervention assessments.

For students with persistent spelling difficulties, traditional approaches such as phonics and whole-word memorization may fall short in addressing the complexities of English orthography. Phonics and whole-word memorization techniques may not be sufficient for

teaching English orthography to learners with persistent spelling difficulties (Bowers, 2021). SWI offers a discovery-based learning approach to spelling by incorporating morphology, etymology, and phonology (Bowers, 2021). Examining educators' experiences with SWI can provide insights into how SWI supports spelling instruction beyond rote memorization. SWI enables students to deconstruct words into their smallest meaningful units to help them understand spelling patterns and the rules that govern them (Devonshire et al., 2013). Deconstructing words is particularly beneficial given the shallow orthography of English where many words cannot be easily decoded through phonics alone (Devonshire et al., 2013). By exploring how educators implement SWI in the classroom, this study seeks to highlight the potential of a linguistically grounded, inquiry-based approach to support more effective and meaningful spelling instruction.

Understanding how educators implement SWI can shed light on its potential to support students with spelling difficulties particularly those for whom traditional memorization-based methods are ineffective. The approach educators use to implement SWI may provide qualitative evidence about its effectiveness for students with spelling difficulty including those with perceptual challenges that hinder their ability to memorize whole words (Haight, 2022). SWI's theoretical foundation aligns well with this study's methodological approach. SWI addresses the need for more comprehensive spelling instruction methods by focusing on the morphology, etymology, phonology, and orthography of words. Educators' real-world experiences with SWI will offer valuable insights into whether SWI improves spelling abilities in students who have not succeeded with traditional methods.

Literature Review Related to Key Concepts and Variables

Introduction to SWI

SWI is an emerging method of literacy instruction that differs from traditional phonics-based approaches by emphasizing the morphology, etymology, and phonology of spelling. Bowers (2022) and Hastings and Trexler (2021) highlighted the limitations of traditional phonics instruction and demonstrated how SWI addresses these issues by providing a deeper exploration of English spelling. Bowers noted that SWI helps clarify confusion about irregular spelling by teaching students about morphological structures and word origins, thereby improving their understanding of spelling. Hastings and Trexler focused on the instructional aspect of SWI to advocate for a "critical literacy context" term where students actively learn by questioning and exploring language. Bowers and Hastings and Trexler concluded that SWI goes beyond decoding phonics rules to offer a more comprehensive literacy approach that enhances learners' understanding of language structure. SWI provides a more holistic approach to literacy instruction by integrating morphology, etymology, and phonology to foster a deeper and more meaningful understanding of English spelling.

SWI has been shown to enhance students' participation and understanding through shared principles. Bowers (2022) highlighted that learning morphological matrices and word sums helps students connect the meanings and spellings of words. Hastings and Trexler (2021) demonstrated that SWI enables students to collaboratively explore and uncover linguistic features of the English language. Hastings and Trexler explored how the inquiry-based approach challenges traditional educator-student relationships to empower students to take a more self-directed role in their literacy learning, while Bowers (2022) focused on building technical proficiency. Both

studies emphasized that SWI strengthens spelling skills and fosters active student engagement during lessons.

Bowers (2022) and Hastings and Trexler (2021) highlighted the broader instructional benefits of SWI, demonstrating that it enhances literacy skills and fosters critical thinking in students. Bowers emphasized the value of understanding morphological-phonological connections, arguing that this approach supports improved vocabulary development. Hastings and Trexler proposed that SWI could transform literacy education into a critical literacy framework, encouraging students to explore aspects of language overlooked in traditional phonics instruction. These findings collectively suggest that SWI strengthens traditional literacy skills while also cultivating critical literacy, enabling students to engage more deeply with the structure and nature of language.

Bowers (2022) and Hastings and Trexler (2021) acknowledged the challenges of implementing SWI but proposed strategies to address them. Irregular word spelling is taught as exceptions to the rules in traditional phonics programs. However, Bowers argued that SWI explains these exceptions through morphological structures to make spelling more accessible and understandable for students. Hastings and Trexler emphasized the need for collaborative PD to prepare educators for SWI's inquiry-based model. The authors noted that training educators to incorporate SWI into their practice enhances instructional quality and student outcomes. Together, the insights from Bowers and Hastings and Trexler highlighted SWI as a powerful tool for improving literacy skills and transforming the broader process of literacy acquisition.

Historical Context and Development of SWI

SWI is an instructional approach integrating morphology, etymology, and phonology into the study of spelling. Zapata and Ribota (2021) described that learners benefited most when instruction addressed multiple linguistic elements. Bowers' (2018) systematic review highlighted that morphological instruction yields the greatest benefits for learners. Similarly, Levesque et al. (2021) demonstrated that understanding word components enhanced spelling skills. These studies reinforced the growing body of evidence that SWI provides a more comprehensive approach to literacy development, surpassing the limitations of phonics-only instruction.

The debate between phonics-based and morphology-based instruction in early literacy persists. Bowers and Bowers (2021) critically analyzed phonics instruction, which is often advocated as the foundational component of early reading programs. The authors argued that, based on empirical evidence from phonics-based intervention studies, SWI offers a more conceptual approach, providing learners with a broader understanding of spelling and word-formation patterns. Bowers and Bowers' perspective aligns with Treiman and Kessler's (2022) meta-analysis on statistical learning in reading and spelling across languages. The author's research on cross-linguistic data concluded that learners develop explicit and implicit writing patterns that align with the direct instruction in SWI. Bowers and Bowers and Treiman and Kessler critiqued phonics from different angles, highlighting the importance of focusing on the structural and meaning-related aspects of words in literacy instruction.

Spelling instruction has undergone significant changes, shifting from rote memorization and repetitive drills to more contextually based and complexity-sensitive approaches. Pan et al. (2021) examined this historical transition, noting that early 20th-century practices such as weekly spelling lists and high-stakes tests have largely been abandoned in favor of more implicit

instruction. As a result, formal spelling education has received little emphasis in many classrooms today. However, systematic approaches like SWI remain effective in literacy instruction. Pan et al. (2021) documented the benefits of these approaches, aligning with Zapata and Ribota (2021), who found that explicit morphological instruction is particularly crucial for early learners.

Despite the shift toward implicit instruction, research indicates that structured spelling practice remains vital to literacy development. Van den Boer and Bree (2023) found that additional practice enhances spelling performance, while Marinelli et al. (2021) reported that repetition fosters automaticity in spelling skills. Similarly, Pan et al. (2021) supported the conclusion that structured spelling instruction remains relevant despite evolving educational trends. These findings emphasize the importance of incorporating evidence-based spelling instruction and practice to ensure that students develop strong foundational literacy skills regardless of shifting educational approaches.

Research also supports the importance of direct instruction in improving spelling and other literacy skills. In their response to criticisms of SWI, Bowers and Bowers (2021) highlighted the advantages of teaching word structure through morphological analysis. Austin et al. (2021) supported Bowers and Bowers view by demonstrating that students taught to recognize word connections outperformed control groups in spelling performance. However, Treiman and Kessler (2022) argued that while traditional learning methods are insufficient for developing a deep understanding of spelling, instructional methods that engage learners with the structural features of words can be highly effective. While the studies employed different methodologies such as meta-analysis, intervention experiments, and cross-linguistic review, their findings

collectively emphasize the effectiveness of instructional approaches that focus on word patterns and meanings in fostering literacy development.

Effectiveness of SWI in Enhancing Spelling Skills

Research on spelling instruction highlights variations in teaching methods when comparing orthography-based approaches to phonics-based instruction. Georgiou et al. (2021) evaluated the effects of SWI, which emphasizes word morphology, compared with a phonics-based intervention called Simplicity, and found that SWI significantly improved students' spelling skills in areas such as MA and word reading. This aligns with Austin et al.'s (2022) findings, who also observed the positive impact of morphological instruction on spelling. Moreover, Bowers and Bowers (2021) argued that SWI provides a more comprehensive understanding of word structure than phonics, enabling students to gain deeper insights into spelling and word-formation patterns. Their work, along with Treiman and Kessler's (2022) meta-analysis, showed that explicit morphological instruction, as seen in SWI, leads to better outcomes for learners, especially those with persistent reading difficulties. These findings suggest that SWI-focused morphological instruction enhances students' ability to decode and spell words effectively, offering a valuable alternative to phonics-based interventions, particularly for struggling readers.

The effectiveness of morphological instruction in enhancing literacy skills, such as spelling, has been consistently demonstrated across studies. Ng et al. (2022) conducted an intervention study incorporating morphological and etymological elements into spelling instruction for students, showing that students in the intervention group significantly outperformed those in the control group on spelling measures. Similarly, Georgiou et al. (2021)

focused on third graders with learning disabilities and found that morphological learning improved spelling outcomes. Despite differences in methodology, both studies highlight the effectiveness of incorporating morphological instruction to enhance literacy skills, particularly with spelling.

The effectiveness of morphological instruction in improving spelling performance is evident, particularly for learners with dyslexia, as it outperforms traditional phonics-based methods. Vadasy and Sanders (2021) emphasized that phonics instruction alone is insufficient for struggling spellers. The authors demonstrated that morphological and orthographic instruction improved spelling performance more effectively than phonics-based methods. Mendes and Kirby (2024) found that instruction in MA significantly improved morphological decoding and spelling but not fluency. Mendes and Kirby and Vadasy and Sanders advocated using morphological instruction as an alternative to conventional phonics approaches. The authors concluded that morphological interventions yield greater gains in spelling, particularly for children with learning disabilities.

The role of phonological, orthographic, and morphological (POM) knowledge has been a key focus in analyzing the spelling development of learners with varying abilities. Haase and Steinbrink (2022) examined the developmental trajectory of word-specific spellings, including derivational morphology, and revealed that the misspelling patterns of words with derivational suffixes allowed superior spellers to utilize POM knowledge more effectively than average or poor spellers. Petrescu and Helms-Park (2021) acknowledged that strong spellers are better able to apply POM knowledge, which emphasizes the importance of incorporating these linguistic components into spelling instruction to support learners at all proficiency levels. These findings

highlight the critical need for spelling instruction that explicitly integrates POM knowledge to address diverse learner profiles and promote equitable literacy outcomes.

Spelling development is a multifaceted process that evolves as learners advance in their literacy skills, gradually shifting from reliance on phonological strategies to more integrated use of orthographic and morphological knowledge. Mlakar et al. (2025) reported that first-grade spellers primarily relied on phonological processes, whereas third-grade spellers increasingly depended on visual attention span and lexical processing. The authors demonstrated that spelling development involves a dynamic interaction of POM features. Students transition from relying on phonological processing to integrating orthographic and morphological knowledge into their spelling strategies. Despite methodological differences, Petrescu and Helms-Park (2021) and Mlakar et al. demonstrated that spelling proficiency develops through a gradual shift from reliance on phonology to the integration of orthographic and morphological knowledge, underscoring the complexity of the learning process. Together, these studies underscore the developmental progression of spelling skills and affirm the importance of instructional approaches that adapt to learners' shifting reliance on POM knowledge over time.

The relationship between reading and spelling has been widely studied across languages, highlighting the influence of orthographic depth on literacy development. Majorano et al. (2021) found that early reading skills reliably predicted later spelling performance across all languages. Tssemli and Stoumpou (2021) demonstrated that the strength of this connection depends on the transparency of a language's orthography, with more transparent languages, such as Greek, showing a stronger effect. These findings emphasize that, while reading and spelling are closely

linked across languages, the nature and strength of their relationship are significantly shaped by each language's orthographic characteristics.

Effective reading interventions play a crucial role in supporting students with significant word-reading difficulties, highlighting the impact of instructional intensity and design on literacy outcomes. Boucher et al. (2023) found that interventions improved outcomes in pseudoword reading and fluency, with larger gains when intervention hours increased. The findings align with those of Pan et al. (2021), who emphasized the role of structured and intensive interventions in addressing reading challenges. Similarly, research by Georgiou et al. (2020) demonstrated that interventions focusing on MA significantly enhanced spelling and reading skills, further reinforcing the value of comprehensive approaches. The body of evidence highlights the need for tailored intensive reading interventions that target specific challenges and maximize reading development (Boucher et al., 2023; Pan et al., 2021). The studies collectively advocate for a multifaceted approach to reading interventions to achieve the best literacy outcomes.

While the relationship between reading and spelling varies across languages, research has also explored the role of orthographic and morphological instruction in supporting literacy development. Li and Wang (2022) demonstrated that orthographic instruction was effective for learners across different languages, reinforcing the importance of visual word recognition and spelling patterns. Furthermore, Mendes and Kirby (2024) revealed that spelling gains were even more significant for learners with dyslexia when orthographic instruction was combined with morphological instruction. The authors suggested that integrating multiple linguistic elements can provide a more robust foundation for spelling acquisition. Both studies highlighted the significance of cross-linguistic differences, emphasizing orthographic depth as a key factor in

shaping reading and spelling outcomes. The authors emphasized the need for tailored instructional approaches that account for linguistic transparency and the unique challenges faced by struggling readers and spellers.

Research has demonstrated that spelling instruction focused on MA positively affects students' learning outcomes across different linguistic environments. Ardanouy et al. (2023) revealed that students in the morphology group significantly outperformed their peers in spelling accuracy with morphologically complex words. This highlights the importance of integrating morphological instruction in spelling curricula to enhance students' understanding of word structure. Similar findings by Sammour-Shehadeh et al. (2025) on Hebrew-speaking students support the idea that understanding the underlying structure of words rather than relying solely on phonetic rules leads to better spelling proficiency. The studies reinforce the effectiveness of morphology-focused instruction in improving spelling skills particularly for complex words across different languages and student groups.

Research on spelling development across different languages has demonstrated the significance of morphology in literacy instruction by examining how students of varying ages rely on different linguistic cues. Sammour-Shehadeh et al. (2025) described that younger students relied more on phonological transparency while older students depended on affix frequency and morphological prominence. Both Ardanouy et al. (2023) and Sammour-Shehadeh et al. highlighted the effectiveness of morphology-focused instruction in enhancing spelling outcomes. However, factors such as age and linguistic context can influence these results. The authors emphasized the importance of incorporating morphological instruction in literacy education while considering age-related and linguistic factors that shape spelling development.

Morphology plays a crucial role in spelling development when combined with direct, systematic instruction. Ardanouy et al. (2023) showed that instruction improved spelling accuracy for both trained and untrained words. Their approach aligns with Sammour-Shehadeh et al. (2025) who demonstrated that morpho-orthographic transparency is essential for young students' spelling in the early stages of learning. The findings by Ardanouy et al. and Sammour-Shehadeh et al. suggested that morphological instruction should evolve from focusing on basic transparency to incorporating more complex morphological concepts as students mature. The progression supports the idea that SWI-based approaches should adapt to align with students' developing language and literacy skills.

Variations in students' responses to morphological instruction can be attributed to the interconnected nature of POM. Ardanouy et al. (2023) found that French-speaking students showed significant improvements in spelling after morphological training, suggesting that SWI can be effective for a broad range of learners. However, Sammour-Shehadeh et al. (2025) demonstrated that Hebrew-speaking students improved their spelling performance when factors such as affix frequency and orthographic consistency were considered. The findings emphasize the importance of tailoring morphological instruction to the unique features of the language. While SWI provides a robust framework for spelling instruction, its implementation must be flexible to account for the linguistic characteristics of the language and learners' developmental stages, thereby maximizing its effectiveness.

A comprehensive approach to SWI should consider the unique classroom dynamics and varying learning needs of students. Ardanouy et al. (2023) demonstrated that explicit and intensive morphological instruction significantly improved spelling accuracy for

morphologically complex words. Schiff et al. (2020) highlighted that knowledge of morpho-orthographic principles enhances students' spelling performance during their school years. Both studies suggest that when SWI is implemented with attention to language and learners' developmental needs, it can effectively improve spelling outcomes and holds true across diverse student populations, including those with learning disabilities.

Educator Perspectives, Professional Development, and Collaborative Support

This section explores the critical role of educators in implementing SWI in their instruction. It examines educators' perceptions, knowledge, and challenges regarding SWI, as well as the impact of PD on instructional practices. Additionally, the section highlights the importance of collaborative partnerships and ongoing support systems that empower educators to effectively integrate SWI into literacy instruction.

Educators' Perceptions and Implementation of SWI

Instructional differences and educators' perceptions of SWI have been associated with differences in students' achievement levels. Benedict et al. (2020) and Esposito et al. (2023) aimed to identify the challenges educators face when teaching spelling. While they adopted different approaches to their investigations, Benedict et al. found that educators who participated in lesson study cycles were more effective at coordinating word study across different instructional levels. On the other hand, Esposito et al. found that many educators needed clearer directions to avoid inconsistent teaching. The findings by Benedict et al. and Esposito et al. imply that educators require content knowledge and well-framed support to facilitate SWI. These studies highlight the critical role of educator preparation and structured PD in ensuring the consistent and effective implementation of SWI across diverse classroom contexts.

Educators' Knowledge, Professional Development, and Implementation Challenges

The literature on educators' perceptions of SWI and its implementation highlights both benefits and challenges. Benedict et al. (2020) explored the impact of PD on educators' knowledge of tiered reading instruction in Project InSync. The findings revealed significant improvements in educators' understanding of word study instruction and their ability to apply strategies effectively across different instructional levels. Similarly, Daffern and Mackenzie (2020) found that while educators recognized the importance of using appropriate strategies for teaching spelling, many struggled to provide adequate support for students with spelling difficulties. Benedict et al. and Daffern and Mackenzie emphasize the need for comprehensive training and support for educators to enhance their ability to implement effective spelling instruction, particularly within the SWI framework. The studies highlight the importance of addressing the specific challenges faced by students who struggle with spelling.

Effective implementation of SWI depends not only on educators' knowledge but also on the availability of instructional tools and PD that emphasize precision in spelling instruction. While Benedict et al. (2020) focused on collaborative PD to enhance educator knowledge, Daffern and Mackenzie (2020) emphasized the need for instructional support, highlighting that both knowledge and practical tools are essential for the effective implementation of SWI. Building on the importance of precision in spelling instruction, Kuperman et al. (2021) quantified the impact of correct and incorrect spelling variations on word recognition using information entropy as a measure of uncertainty in spelling. The findings revealed that as entropy increased, word recognition time increased, underscoring the importance of focusing on accurate, structured spelling strategies. Kuperman et al. further suggested that precise spelling

strategies aligning with SWI objectives should be prioritized and supported through PD and instructional resources. The studies collectively highlight the need for targeted training and tools to effectively implement SWI in classrooms.

Bridging the gap between research and classroom practice is essential for improving literacy instruction and the effective implementation of SWI. In the Word Nerds project conducted by Tortorelli and Bruner (2022), the authors found that partnering researchers with educators enabled educators to implement research-based practices in their classrooms, using various teaching methods and emphasizing analogy-based spelling patterns. The findings from the Word Nerds project highlight the benefits of researcher-educator collaboration in enhancing educators' ability to apply evidence-based spelling strategies across diverse educational settings.

Institutional support and clearly defined policies are essential for translating research-informed practices into consistent and effective classroom instruction. Esposito et al. (2023) reported significant variation in teaching practices, finding that 77% of educators developed their own materials because there were no official spelling policies. Esposito et al. and Tortorelli and Bruner (2022) highlighted the value of collaboration and research partnerships in improving instructional practices. However, Esposito et al. also noted the challenges posed by a lack of institutional support, emphasizing the need for structured policies and resources to better support educators in implementing effective spelling instruction. While research partnerships play a crucial role in enhancing instructional practices, the findings underscore the need for well-defined policies and resources to enable educators to effectively implement evidence-based spelling instruction.

Research on spelling instruction increasingly emphasizes integrating grammatical knowledge with evidence-based approaches to enhance literacy outcomes. Chamalaun et al. (2021) examined the relationship between grammatical knowledge and spelling performance to identify a direct link between Dutch secondary school students' ability to distinguish grammatical functions and their proficiency in spelling homophonous verb forms. Similarly, Tortorelli and Bruner (2022) highlighted the benefits of incorporating grammar into SWI-based spelling instruction through research-practice partnerships. Their findings reinforce the importance of combining grammatical knowledge with SWI-based instruction, demonstrating that an integrated approach can strengthen students' spelling proficiency and overall literacy development.

Well-structured, evidence-based practices significantly improve educators' ability to teach spelling effectively. Chamalaun et al. (2021) emphasized the role of grammatical accuracy in spelling instruction while Tortorelli and Bruner (2022) showcased how collaborative research partnerships can help educators integrate both morphological and grammatical components into their teaching methods. These findings suggest that when educators receive support through formal partnerships and research-based guidance, they are better equipped to address spelling challenges involving both grammar and morphology, ultimately leading to improved instructional outcomes.

Educators' attitudes toward students significantly influence their perceptions of spelling instruction and its outcomes. Vögelin et al. (2021) found that essays with poor spelling quality led to more pessimistic educator comments about grammar and vocabulary suggesting that spelling quality strongly affects overall evaluations. The findings highlight the critical role of

educators' perceptions in shaping student outcomes emphasizing the need for awareness and training to ensure that spelling ability does not disproportionately influence broader assessments of language proficiency. Research on literacy instruction increasingly highlights the influence of educator-student interactions on students' self-perceptions and overall academic performance. Benedict et al. (2025) highlighted the importance of supportive and constructive educator feedback showing that both assessment methods and instructional interactions play a crucial role in shaping students' confidence, motivation, and literacy growth. While Vögelin et al. focused on pre-service educators and the impact of spelling on assessments, Benedict et al. emphasized the reciprocal relationship between instructional practices and students' self-perceptions emphasizing the importance of supportive and constructive educator-student interactions. Together, these studies emphasize the importance of supportive and constructive educator feedback demonstrating how assessment practices and instructional interactions can significantly impact students' confidence, motivation, and literacy development.

The Role of MA in Enhancing Spelling Skills Through SWI

SWI has been widely studied for its role in spelling and literacy development with research emphasizing the role of morphology in strengthening word analysis skills. Trexler (2021) investigated the effects of SWI on the self-efficacy of developmental college students and found that SWI improved students' ability to analyze words and their spelling while boosting their self-esteem. Similarly, Toste et al. (2025) explored an intervention with participants who had word-level reading and spelling disabilities and found significant improvements in spelling affixes in polymorphemic words. Both Toste et al. and Trexler highlighted SWI's effectiveness in

enhancing students' ability to use meaningful word units for spelling and reading while also increasing their confidence across different academic levels.

Research has increasingly highlighted the significance of non-phonological strategies in spelling development, underscoring the roles of morphology, orthography, and lexical knowledge in effective literacy instruction. Spelling improvement through SWI has been linked to non-phonological strategies, as demonstrated by Sproat & Gutkin (2021). While students found morphological strategies more challenging to implement, the strategies proved essential for spelling as students advanced to higher grades. Issa (2022) reported similar findings in a study on the role of morphological complexity in Arabic spelling among typically developing learners and those with learning disabilities, revealing that both groups benefited from understanding morphological structures. However, students with learning disabilities made more errors, highlighting the additional challenges they faced. Both studies reinforced the importance of SWI for spelling instruction, showing that introducing morphological strategies early in education can provide a valuable tool for addressing spelling difficulties and equip learners with effective methods for navigating complex word structures.

The neurological foundations of spelling behavior provide further support for the role of morphology in spelling. Cheema et al. (2022) identified a significant correlation between spelling accuracy and neural activity in the brains of adults with impairments, as measured using diffusion-weighted imaging of white matter tracts. Similarly, Berg and Aronoff (2021) found that although phonological forms may overlap, morphological distinctions in writing remain critical for maintaining consistency and meaning. The evidence aligns with SWI's emphasis on morphology in spelling instruction, further validating its relevance and effectiveness in teaching

literacy. By highlighting the central role of morphology in English orthography, these studies underscore the importance of instructional approaches that go beyond phonics to foster students' deeper understanding of spelling conventions and word structure.

Impact of Spelling Skills on Student Perceptions and Confidence

Research on the effects of SWI on students' learning outcomes has revealed both benefits and implementation challenges. Benedict et al. (2025) found that SWI positively influences the development of reading and spelling skills but also highlighted the difficulties educators face when implementing it. Benedict et al. noted that students' self-confidence and learning experiences were significantly influenced by how word study was presented. In a related study, Carvalhais et al. (2021) revealed increases in spelling accuracy and syntactic complexity as students progressed through grade levels and suggested that SWI can be beneficial for both reading and writing development. Together, Benedict et al. and Carvalhais et al. demonstrated the interconnectedness of instructional practices, students' self-concept, and learning outcomes. Both highlighted how thoughtfully designed word study can enhance both students' skills and their confidence in reading and writing.

Difficulties in reading are linked to challenges in writing, highlighting the interconnectedness of these skills. Graham et al. (2021) revealed that children with reading difficulties consistently performed worse in writing tasks, including spelling, vocabulary, and sentence formation. Furthermore, they found that children with reading difficulties were less efficient in spelling and writing than their younger peers with similar reading abilities. Similarly, Krasa and Bell (2021) found that students who had difficulty mastering orthographic conventions also had difficulty with spelling. Both Graham et al. and Krasa and Bell demonstrate a strong

link between reading and writing, supporting the idea that interventions targeting one domain can positively influence the other. The findings highlight the potential of integrated literacy instruction to address challenges in both reading and writing simultaneously.

Intersection of Reading and Spelling Skills

The analysis of reading and spelling interventions highlights the possibility of teaching and enhancing foundational literacy. Bazis et al. (2022) evaluated the effectiveness of the Write Sounds integrated intervention and found that students who received the Write Sounds intervention demonstrated significant improvements in both word reading and spelling performance. The results suggest that a multi-component instructional approach can be highly beneficial in supporting students with early literacy difficulties. Similarly, McMurray (2020) examined the role of POM to find that early and systematic instruction is critical for students' long-term success in literacy. Bazis et al. emphasized a multidimensional approach to literacy instruction integrating multiple aspects of reading and writing to support struggling readers, while McMurray highlighted the developmental nature of spelling and advocated comprehensive interventions during early childhood. Together, these studies reinforce the importance of holistic and early interventions to build strong literacy foundations.

The relationship between morphological structure and reading and spelling performance has been a central focus of research, with findings showing that its impact can vary depending on specific linguistic features. Sandra et al. (2024) reviewed studies on morphological structure and orthographic representation, highlighting that understanding a word's morphology can facilitate spelling. Their findings emphasize the dual role of MA in literacy development by demonstrating that while it can enhance spelling accuracy, it may also introduce challenges when dealing with

complex or less familiar morphemes. Similarly, Ardanouy et al. (2024) found that students who received morphology-focused instruction showed significant improvements in spelling complex words and moderate gains in reading rate and accuracy. Both Ardanouy et al. and Sandra et al. emphasized that while MA is essential for improving spelling, the complexities of morphological structures can present challenges for learners with literacy difficulties. Their findings underscore the need for tailored instructional approaches to address the intricacies of morphology in literacy education.

Phonological processing and orthographic knowledge are critical components of early reading and spelling development. Sigmund et al. (2024) examined cognitive predictors of spelling and reading to find that PA and letter knowledge are significant predictors of early spelling. In addition, rapid automatized naming (RAN) emerged as a key predictor of reading development. Complementing this approach, Zarić et al. (2021) explored the role of orthographic knowledge in reading and spelling abilities, showing that both word-specific and general orthographic knowledge were significant predictors of reading and spelling performance and were independent of intelligence and PA. Together, Sigmund et al. and Zarić et al. emphasized the importance of phonological and orthographic skills in literacy learning, with orthographic knowledge playing a particularly strong role in spelling development. These findings suggest that targeted instruction in both areas is essential for fostering early literacy skills.

Teaching strategies that target reading and spelling often rely on phonics-based techniques; however, their effectiveness can vary significantly across different learner profiles. Linder et al. (2023) evaluated a modified phonics-based reading intervention for students with intellectual disabilities and found that participants demonstrated gains in reading, with only two

showing measurable improvement in spelling. This suggests that while phonics instruction can support reading development, its impact on spelling may be limited. Similarly, de Magalhães et al. (2022) identified a strong correlation between spelling and word-reading skills. Their study showed that children receiving systematic phonics instruction outperformed those taught through alternative methods, reinforcing the value of structured phonics. However, their findings also highlighted the necessity of individualized adaptations to address specific learning differences. Collectively, the research by Linder et al. and de Magalhães et al. underscores that phonics-based instruction can effectively support learners with developmental or learning challenges, particularly in reading. Nonetheless, the studies also caution that spelling development may lag reading progress and require additional, individualized support to fully meet the diverse needs of learners.

Intervention programs targeting basic reading and spelling processes, PA, and lexical development have been shown to significantly improve literacy skills. Sucena et al. (2023) evaluated the effectiveness of a program designed to enhance PA and emergent literacy skills. The authors found that children in the intervention group outperformed their peers in reading and spelling tests highlighting the importance of early intervention programs in fostering PA and foundational literacy skills. By demonstrating significant improvements in reading and spelling among preschool children, Sucena et al. reinforce the value of structured literacy instruction in preparing young learners for future academic success. Similarly, Incognito et al. (2023) explored the impact of a lexical enhancement program on second-grade children's reading and spelling abilities. Their study found that participants in the program demonstrated greater reading accuracy and better spelling performance than a control group. Both studies highlighted the

critical role of early intervention programs in developing foundational literacy skills. Their findings emphasize the importance of implementing effective teaching strategies in early childhood to support reading and spelling accuracy laying the groundwork for long-term literacy success.

Parental involvement plays a key role in early literacy development influencing children's reading and spelling abilities. Silinskas et al. (2021) identified a responsive element in parent-child interactions, in which parents adjusted their reading instruction based on the child's reading skills. However, this adaptiveness was less evident in spelling instruction. Parents were observed teaching spelling at the same level before and after the transition suggesting that spelling requires more time and effort to develop compared to reading. These findings align with Linder et al. (2023) who noted that even modified phonics interventions require substantial effort to improve spelling performance. Together, these results emphasize the need for ongoing, targeted interventions to support spelling instruction especially at the emergent reading level.

SWI also plays a critical role in enhancing literacy outcomes in reading and spelling. Georgiou et al. (2022) found that children with developmental dyslexia exhibited significantly lower MA than their peers highlighting the challenges faced by dyslexic learners in developing this crucial aspect of literacy. The authors stressed the value of incorporating SWI which focuses on morphology instruction into interventions for students with reading and spelling difficulties. Similarly, Levesque and Deacon (2022) found that MA significantly predicted improvements in decoding complex words underscoring the effectiveness of SWI in helping young learners master word structure. However, they also noted that this improvement did not extend to all areas of word reading suggesting that SWI should be complemented with additional strategies to ensure

comprehensive literacy development. These studies collectively highlight that while SWI's focus on morphology enhances key literacy skills a multi-faceted approach is necessary for addressing all dimensions of word reading and spelling.

The impact of SWI on literacy outcomes for learners with reading difficulties has been examined in recent studies highlighting both its effectiveness and limitations. Georgiou et al. (2022) emphasized that children with dyslexia often experience morphological impairments underscoring the importance of enhancing morphological knowledge to address these challenges. The authors suggested that SWI can be particularly beneficial for students with dyslexia by targeting these specific deficits. In contrast, Levesque and Deacon (2022) focused on typical readers and found that teaching morphological structures significantly improved students' ability to decode complex words. However, they also noted that SWI had a limited impact on more generalized word-reading abilities suggesting that its benefits may be more pronounced in decoding complex words rather than enhancing overall reading fluency. Georgiou et al. emphasized the need for a multifaceted approach for dyslexic learners while Levesque and Deacon illustrated the targeted benefits of morphology for specific reading tasks suggesting that SWI might be more effective when tailored to the needs of struggling readers. Despite these differences, both studies agree on the crucial role of MA in improving reading skills particularly when encountering complex words. Therefore, while SWI is a valuable tool in literacy development, its effectiveness may be enhanced when combined with other evidence-based literacy interventions to address a broader range of reading and spelling challenges.

Integration and Effectiveness of Computer-Assisted Learning

Technology has proven to be a valuable tool for supporting SWI and fostering literacy development as demonstrated by various intervention studies. Carvalhais et al. (2020) and Carmona et al., (2025) explored the effectiveness of computerized interventions in reading and writing. The studies revealed that the participants made significant gains in spelling and PA. The gains observed suggest that digital tools like can serve as effective support for letter-sound correspondence and early literacy acquisition and highlight the growing role of technology in supplementing traditional instructional approaches to better meet the diverse needs of learners. In contrast, Ng et al. (2022) investigated the impact of the morphological matrix, a technology-based tool for teaching morphology, by examining affix- and base-centered word organization in a memory study. Their results showed that grouping words by base significantly improved recall of morphologically complex words compared to grouping by affix. The finding emphasizes the role of technology in enhancing morphological knowledge which is a critical component of literacy acquisition. While Carmona et al., Carvalhais et al. and Ng et al. demonstrated the potential of technology to enhance literacy, the studies focused on different aspects of language learning. Carmona et al. and Carvalhais et al. focused on phonology while Ng et al. focused on morphology. Together, their findings emphasize the versatility of technology in supporting various facets of literacy development offering tailored interventions to address specific learner needs.

Technology can support writing instruction by providing feedback systems, though their effectiveness depends heavily on the type of feedback delivered. McCarthy et al. (2022) found that while strategy-focused feedback significantly improved essay quality across content, organization, and mechanics, spelling and grammar checks yielded only modest gains in

mechanics and word choice. A comprehensive meta-analysis by Biju and Vijayakumar (2023) similarly concluded that automated writing evaluation tools are most effective when they offer multi-type, adaptive feedback and not just error-flagging enabling iterative revisions and promoting self-assessment skills. Together, these findings suggest that although automated spelling and grammar feedback can support the revision process, writing instruction benefits most from systems that combine strategic guidance with adaptive feedback, encouraging deeper engagement and skill development

Research on technological interventions in SWI and literacy instruction highlights their potential to enhance reading and writing skills. However, the effectiveness of these interventions depends on their specific focus and implementation. Carvalhais et al. (2020) emphasized the benefits of game-based interventions for improving PA demonstrating their effectiveness in addressing word-level reading difficulties. Ng et al. (2022), on the other hand, displayed how morphology-based tools such as a morphological matrix could enhance memory retention for complex words by organizing them according to their morphological structures. The findings emphasize the importance of aligning technological interventions with specific literacy goals demonstrating that while game-based tools can strengthen PA, morphology-focused approaches may be more effective in enhancing word recognition and retention.

McCarthy et al. (2022) explored the use of spelling and grammar checkers in writing instruction finding their positive effects to be limited. The study showed that more significant improvements were achieved when these tools were supplemented with robust, strategy-focused feedback, emphasizing the importance of comprehensive writing support. Together, the studies by Carvalhais et al. (2020), Ng et al. (2022) and McCarthy et al. suggest that while technology

can support SWI and literacy development, its impact is maximized when tailored to address specific literacy challenges such as phonological, morphological, or writing difficulties ensuring a more targeted and effective approach to literacy instruction.

The integration of technology in literacy instruction has yielded mixed results with its effectiveness varying based on implementation and instructional context. The findings of McCarthy et al. (2022) contrast with the observations of Carvalhais et al. (2020) and Ng et al. (2022) where technology played a more central role in enhancing literacy skills in phonological and morphological areas. The findings suggest that while technology can enhance phonological and morphological skills, its success depends on thoughtful integration with strategic teaching methods reinforcing the need for a balanced approach to literacy instruction.

Incorporating technology into SWI has become increasingly prevalent as a means of engaging students while enhancing their understanding of spelling and literacy. Yun and Crippen (2024) revealed that technology effectively supports students during observation and data interpretation stages of inquiry-based learning. They highlighted how technology bridges the gap between real-world contexts and learning activities. This approach is relevant to SWI where tools can strengthen connections between the etymology and morphology of words. Similarly, Mamun (2022) found that technology facilitated students' self-regulation and motivated exploration of scientific contexts providing structure and encouragement for deeper inquiry. Technology can play a significant role in SWI by helping students navigate and understand the complex linguistic features of spelling and word structure. By fostering connections, self-regulation, and exploration, technology enhances the inquiry processes essential for effective SWI instruction.

Integrating technology-enhanced inquiry-based learning approaches has proven to be effective in promoting student learning outcomes and educators' instructional practices. Kussmaul and Pirmann (2021) examined the use of technology in process-oriented guided inquiry learning to enhance social constructivism in introductory courses. The authors found that technology improved the feasibility and efficiency of inquiry learning. Their findings emphasize the value of leveraging digital tools to create more interactive and student-centered learning environments. Similarly, Wu et al. (2023) showed that students who used the platform demonstrated enhanced cognitive abilities and more positive perceptions of learning. The combined insights from Kussmaul and Pirmann and Wu et al. suggest that technology effectively supports student inquiry and inquiry-based teaching. The findings can be generalized to SWI by highlighting how technology can facilitate linguistic inquiries and spelling investigations to foster a deeper understanding of word structure and literacy concepts.

While technology plays a vital role in enabling inquiry-based learning, an educator's subject-specific pedagogical knowledge is essential for effectively leveraging technology. Mualim et al. (2025) emphasized the importance of Technological Pedagogical Content Knowledge (TPACK) in inquiry-based science education. Their literature review revealed that educators with strong TPACK are better equipped to integrate technology into their teaching to improve their ability to facilitate inquiry learning. The findings emphasize that while technology enhances inquiry-based learning, its effectiveness ultimately depends on educators' ability to strategically integrate it, drawing on strong pedagogical and content knowledge. Similarly, Chen and Chen (2025) explored the use of technology in inquiry learning and highlights the challenges educators face in selecting appropriate tools. Chen and Chen noted that integrating advanced

pedagogical models with complex technologies can sometimes overwhelm educators. Chen and Chen, and Mualim et al., emphasized that for technology to enhance inquiry-based approaches, educators must have a thorough understanding of how it can support their instructional strategies. Their insight is particularly relevant to the development and use of SWI in literacy classrooms, where effective integration of technology requires strong TPACK.

Incorporating technology into group work and fostering an environment where students can learn both independently and collaboratively are effective strategies for promoting SWI in diverse settings. Chen and Chen (2025) highlighted the role of technology in supporting critical thinking and collaboration, two key components of SWI. Interactive technologies allow students to engage in group linguistic projects, collaboratively analyze results, and discuss findings, deepening their understanding of linguistic structures. Supporting collaborative learning and critical thinking aligns with the findings of Wu et al. (2023), who demonstrated that technology-enhanced platforms facilitating student-generated questioning promote peer interaction and active participation in scientific inquiry. Both Chen and Chen and Wu et al. emphasized the importance of technology in fostering collaboration and participation. Their insights suggest that similar technological tools can be effectively utilized to engage students in investigating word structure and etymology within SWI to enhance their active role in constructing knowledge.

Comparison of SWI With Other Spelling Interventions

Comparing findings from various spelling interventions highlights key differences between phonics-based and morphology-based approaches such as SWI. Bowers (2021), Ehri (2020) and Veríssimo et al. (2021) provided support for the foundational role of these approaches in literacy instruction. Ehri and Veríssimo et al. emphasized the importance of

phoneme awareness as a critical component of early reading while Bowers advocated for SWI which prioritizes understanding word structure and morphology. Pittman et al. (2022) also contributed to this discussion noting that while educators often recognize the significance of phonological and morphological patterns in spelling many lack adequate preparation to teach spelling effectively. The findings emphasize the need for balanced instructional approaches that integrate these elements. On the other hand, Buckingham (2020) and Wyse and Bradbury (2022) criticized Bowers arguing that the evidence strongly supports systematic phonics as a superior method for early literacy acquisition. Buckingham and Wyse and Bradbury maintained that phonics is more effective than other techniques for teaching foundational reading skills reigniting the debate on the optimal approach to literacy instruction. The findings highlight the ongoing debate over the most effective approach to early literacy instruction reinforcing the argument for systematic phonics as the superior method for teaching foundational reading skills and challenging alternative approaches like SWI.

Morphology-based interventions have demonstrated positive outcomes for learners with dyslexia. Galuschka et al. (2020) and Li and Wang (2022) demonstrated that morphology-based interventions can effectively support students with dyslexia and spelling disorders. The findings were further reinforced by the experimental study of Reyes-Giordano and Fienup (2023). Their results also align with Colenbrander et al. (2021) who evaluated the effectiveness of SWI and found it beneficial though they noted that its successful implementation often depends on the mode of delivery and the preparation of educators. Joye et al. (2020) and McMurray (2020) further explored this issue with their analyses indicating that phonics-based and morphology-based instruction can sometimes be interchangeable depending on the linguistic characteristics of

the language being taught. Since different languages present unique challenges in spelling, the findings highlight the importance of incorporating both phonological and morphological approaches in balanced literacy programs. Such programs should be tailored to meet the specific needs of individual learners to ensure that instructional strategies are both effective and contextually appropriate.

Phonics Versus Morphological Instruction

The debate over how to improve literacy skills reveals significant differences in the perceived effectiveness of SWI compared to other spelling interventions. Ehri (2020) and Veríssimo et al. (2021) advocated systematic phonics emphasizing its role in mapping grapheme-phoneme correspondences to aid in identifying sight words. In contrast, Bowers (2021) critiqued phonics for neglecting the irregularities present in many words when used in isolation. Bowers supported SWI as it incorporates morphology and etymology to analyze and understand word structures. Williams (2023) contributed to the ongoing "Reading Wars," debating whether phonics or integrative approaches like SWI are more suitable for literacy instruction. While all these authors agree on the importance of teaching foundational reading skills, they diverge on the methods most effective for early-grade instruction: systematic phonics versus SWI's morphology-based approach (Bowers, 2021; Veríssimo et al., 2021; Williams, 2023). Further supporting a balanced perspective, van den Boer and Bree (2023) demonstrated that both explicit and implicit practice in applying spelling rules can enhance children's spelling abilities. They suggested that these methods could effectively complement traditional classroom practices bridging the gap between phonics-based and morphology-based strategies in literacy education.

Comparative analyses have shown that morphology-based instruction through SWI often yields superior outcomes for individuals with dyslexia and poor spelling skills. Galuschka et al. (2020) and Li and Wang (2022) found that while phonics is effective, morphological instruction consistently produces better results for students struggling with spelling. Supporting this, Papadopoulos et al. (2020) emphasized the importance of MA combined with cognitive and linguistic predictors such as PA and RAN in spelling acquisition. Similarly, Reyes-Giordano and Fienup (2023) demonstrated that morphology-based interventions significantly improved spelling outcomes for students performing below grade level. The findings align with van den Boer and Bree (2023) who showed that both explicit and implicit practice enhance rule-based spelling. Collectively, these studies suggest that while phonics is particularly beneficial for early literacy development, interventions incorporating morphology and explicit spelling practice such as SWI are more effective for learners with learning disabilities.

Interplay of Morphological, Phonological, and Cognitive Factors

Comparisons between SWI and other spelling interventions highlight the interconnected roles of morphological, phonological, and cognitive processes in spelling development. Sandra (2022) demonstrated how token frequency and working memory influence spelling accuracy. The findings emphasize the complexity of spelling development emphasizing that effective instruction should integrate morphological, phonological, and cognitive processes to address the diverse factors influencing spelling accuracy. Similarly, McNeill et al. (2023) highlighted the mediating role of early spelling explaining why young learners often perform better in spelling than decoding and emphasizes the importance of early spelling interventions for literacy development. Niolaki et al. (2022) further emphasized the predictive power of PA and RAN in

spelling development demonstrating that cognitive processes are integral to spelling and vary based on word types. The findings suggest that while morphology is a significant strength of SWI, factors like PA and RAN are equally crucial for effective spelling instruction. Together, they underline the need for balanced approaches that integrate morphological, phonological, and cognitive strategies to support comprehensive literacy development.

The advantages and limitations of morphological instruction in spelling interventions have been explored extensively. Sandra (2022) highlighted the importance of using morphological structures to facilitate lexical access for spellers but cautioned against overreliance on these structures as it could hinder the accurate spelling of homophones. Smejkalová and Chetail (2023) showed that learning spelling within a semantic context enhanced both orthographic and semantic learning, thereby strengthening the connection between word meanings and their spellings. Niolaki et al. (2022) demonstrated that phonological processes play a critical role in spelling various word types, particularly irregular and pseudowords. The studies highlight the role of morphological instruction in spelling interventions, emphasizing that while morphology supports lexical access and orthographic learning, it must be complemented by phonological processes to ensure comprehensive spelling development, particularly for irregular and pseudowords.

Understanding the neurological basis of dyslexia is essential to developing effective literacy interventions that address the specific challenges dyslexic learners face. Werth (2023) explored how damage to brain regions impairs letter recognition, highlighting the difficulties dyslexic students face in reading and spelling. This finding emphasizes the need for interventions that address these cognitive impairments. In contrast, Bowers (2021) focused on the linguistic

aspects of dyslexia, arguing that integrating morphological and phonological instruction is essential for supporting students with dyslexia in spelling and reading. While Werth concentrated on neurological challenges, Bowers highlighted how addressing both cognitive and linguistic difficulties through a combination of morphological and phonological instruction could provide more comprehensive support. These studies collectively suggest that a multifaceted approach, combining neurological insights with cognitive and linguistic instruction, can significantly improve literacy outcomes for dyslexic learners by targeting both brain function and language processing difficulties.

Impact on Diverse Populations

Teaching and learning POM spelling across multiple languages presents unique challenges due to variations in linguistic structure. Joye et al. (2020) investigated spelling errors in French- and English-speaking children diagnosed with Developmental Language Disorder, revealing that French children made more morphological errors, whereas English children frequently violated orthographic rules. Similarly, Casani et al. (2022) found that Italian children with stronger morphosyntactic skills showed better decoding accuracy with POM instruction. In contrast, studies on English spelling, such as those by Georgiou et al. (2021), showed that the orthographic nature of English poses its own set of challenges, with students often struggling to adhere to inconsistent orthographic rules. This comparison emphasizes the need for tailored spelling instruction: languages with complex morphology, like French, may benefit more from a morphological focus in SWI, while languages like English may require a balanced approach that addresses both orthographic and morphological components.

The effectiveness of different spelling instruction methods continues to be debated, with growing support for approaches that integrate multiple linguistic components rather than relying solely on phonics-based strategies. McMurray (2020) criticized the widespread reliance on synthetic phonics for spelling instruction, arguing that it does not support long-term spelling performance, particularly for students with learning disabilities. Instead, McMurray advocated interventions that integrate POM components, aligning with the principles of SWI to address individual learning differences more effectively. Casani et al. (2022), Joye et al. (2020), and McMurray highlight the importance of a comprehensive, structured approach to spelling instruction, such as SWI, which recognizes the interplay between POM while accommodating the diverse needs of learners.

Research on spelling instruction increasingly advocates for integrative approaches that reflect the complexity of language and support diverse learning needs. Bulut and Kirbas (2023) further supported an integrative approach emphasizing the systematic and harmonious nature of spelling instruction as consistent with SWI's framework. Bulut and Kirbas reinforce the importance of structured yet flexible spelling instruction, demonstrating that aligning teaching methods with the natural intricacies of language can enhance both instructional effectiveness and learner engagement.

Growing evidence supports integrating morphological instruction into spelling programs as a key component of effective literacy development. Ardanouy et al. (2023) demonstrated that intensive morphological training led to significant improvements in spelling and reading. Ardanouy et al. emphasizes the importance of morphology in literacy acquisition demonstrating that intensive morphological training can enhance both spelling and reading skills, reinforcing

the comprehensive approach advocated by SWI. Additionally, Panda et al. (2023) found that early spelling interventions such as those in the Empower™ reading program significantly enhanced children's reading development compared to traditional methods. Their findings support the need for balanced literacy programs that integrate POM strategies. Such approaches cater to the diverse needs of individual learners, reinforcing both spelling and reading skills in ways tailored to support effective literacy development.

Incorporating Research-Based Practices in the Classroom

Evidence-based practices in classroom instruction have consistently proven effective across diverse areas including research-based spelling programs and culturally relevant literacy approaches. Studies by Benedict et al. (2020) and Daffern and Fleet (2021) highlighted the critical role of empirical research in informing educators' instructional practices. Thongseiratch et al. (2021) and Ye and McBride (2022) emphasized the influence of contextual factors in adapting instruction to meet students' unique needs. Levesque et al. (2021) and Tortorelli and Bruner (2022) further emphasize the effectiveness of morphological instruction in improving both spelling and reading comprehension. The findings support the integration of tailored approaches such as small group instruction as evidenced by Broughton (2023) in the Words Their Way program which significantly enhanced spelling accuracy demonstrating the benefits of differentiated instruction. Broughton's work reinforces the necessity of adaptable, evidence-based strategies in spelling education to address students' varied skill levels. Together, these studies advocate for instructional practices grounded in research and are responsive to the diverse needs of learners ensuring effective literacy development.

Recent research continues to support the role of MA instruction in enhancing literacy when student-centered pedagogies. Expanding on the effectiveness of morphology-focused interventions, Mulder et al. (2022) evaluated a MA intervention for Dutch secondary school students using an inquiry-based learning approach. Their research highlighted the value of teaching morphological patterns to deepen students' understanding of word structure. The findings emphasized that MA interventions must be flexible to accommodate varying proficiency levels and that effective educator training is critical for successful implementation. Mulder et al. emphasize the importance of inquiry-based learning as a tool to enhance students' morphological knowledge, which is linked to improved literacy outcomes. These findings underscore the need for adaptable well-supported MA interventions that to build foundational skills while fostering deeper linguistic inquiry to support long-term literacy growth.

Building on the evidence for morphology-focused instruction, additional studies have explored how structured, multisensory approaches contribute to sustained literacy development. Complementing Mulder et al. (2022), Panda et al. (2023) demonstrated the long-term benefits of structured interventions like Empower™ Reading which integrate decoding and spelling instruction. Their study showed significant improvements in students' reading trajectories reinforcing the effectiveness of comprehensive, research-based approaches. Collectively, the studies underline the value of explicit instruction and evidence-based strategies in fostering robust literacy skills. They also highlight the importance of bridging the gap between theoretical research and practical classroom application ensuring interventions are both effective and adaptable to diverse educational contexts.

Research-Practice Partnerships

The implementation of research-based practices in the classroom has been shown to significantly enhance instructional methods in spelling as educators combine best practices with research insights. Tortorelli and Bruner (2022) revealed that educators who applied more research-based strategies achieved better student outcomes demonstrating the variability in program implementation. Similarly, Benedict et al. (2020) examined the effects of a PD initiative, *Project InSync*, in which upper elementary educators participated in lesson study cycles focused on tiered reading instruction. The authors found that PD workshops and collaborative lesson planning had a positive impact on the instruction of word study strategies improving both teaching practices and student learning. Both Benedict et al. and Tortorelli and Bruner emphasized the importance of collaborative, research-informed efforts in education. Such partnerships enable educators to effectively translate research findings into practical strategies that enhance student learning outcomes, particularly in literacy and spelling instruction.

To enhance students' academic achievement and effectively incorporate research-based practices in the classroom, it is essential to understand how spelling development occurs. Niolaki et al. (2023) revealed that younger students relied on phonetic spelling strategies while older students increasingly depended on lexical-semantic spelling, particularly for irregular words. The findings by Niolaki et al. are consistent with Sterkens et al. (2023) who examined the consequences of spelling errors in professional contexts. Their study found that such errors in resumes often lead to negative perceptions of a candidate's abilities emphasizing the critical importance of accurate spelling beyond academic settings. Together, the studies highlight the lifelong significance of developing strong spelling skills from early education to professional success.

Effective spelling instruction requires an understanding of how cognitive and linguistic abilities develop across different grade levels. Niolaki et al. (2023) findings reinforce the need for targeted, developmentally appropriate spelling instruction that evolves alongside students' cognitive and linguistic growth, supporting both academic and career readiness. Similarly, Gosse et al. (2021) conducted a detailed investigation of early spelling development by comparing different spelling approaches among kindergarten and first-grade children. Both Gosse et al. and Niolaki et al. emphasized the need to adapt spelling instruction and assessment to align with children's developmental stages. Their findings suggest that more nuanced and well-developed assessment methods are better suited to capturing learners' literacy progress, providing a clearer picture of their evolving skills. Their insights advocate for instructional practices that evolve alongside students' cognitive and linguistic development ensuring that assessments are not only diagnostic but also supportive of continuous learning.

Assessment-Driven Instruction

Assessment for learning has been highlighted as an effective instructional practice for enhancing students' spelling performance particularly with spelling error analysis. Daffern and Fleet (2021) demonstrated significant improvements in spelling achievement among students in the intervention group supporting the use of error analysis to provide targeted, individualized instruction in spelling. The findings align with Broughton (2023) who emphasized the effectiveness of small-group differentiated instruction particularly for low-performing students. Both studies illustrated how tailored interventions, such as error analysis and small-group teaching, can address specific learning needs and improve spelling performance. Together, the

studies highlight the value of data-driven and research-based instructional strategies in fostering literacy development.

Culturally and linguistically appropriate practices remain essential for improving spelling outcomes as different writing systems and linguistic contexts demand tailored instructional approaches. Ye and McBride (2022) examined Chinese literacy development noting that its logographic writing system differs significantly from alphabetic scripts. The authors proposed a dynamic model emphasizing orthographic speed and accuracy as well as techniques designed to address language-specific deficits. Ye and McBride highlighted the necessity of adapting instructional methods to language-specific characteristics demonstrating that a dynamic approach incorporating orthographic speed and accuracy can enhance spelling outcomes in diverse linguistic contexts.

Similarly, Thongseiratch et al. (2021) studied letter-sound association in young learners in Thailand finding it to be a stronger predictor of early word recognition than later spelling skills. Letter-sound association highlights the context-sensitive nature of spelling instruction where the importance of specific factors varies across linguistic systems. Supporting these findings, Iaia et al. (2022) explored novice Italian spellers discovering that they relied on syllable frequency to address difficulties with longer words demonstrating the significance of sub-lexical factors in transparent orthographies. The studies collectively emphasize that effective spelling instruction must be flexible enough to accommodate the linguistic characteristics of students' native languages. Tailoring interventions to the unique demands of different writing systems and considering students' language backgrounds are critical to ensuring success in spelling and literacy development.

Early-stage interventions have been shown to significantly improve spelling skills in the classroom. Niolaki et al. (2022) emphasized the importance of aligning instruction with the progression of phonological and lexical-semantic processes, noting that this approach is especially beneficial for low-performing students learning irregular words. Their longitudinal study demonstrated the value of using sensitive measurement tools to track students' progress and make instructional adjustments as needed. Similarly, Georgiou et al. (2021) supported the idea that adapting teaching methods to students' developmental stages enhances both spelling and reading outcomes, especially when dealing with complex word structures. Together, these studies highlight the need for instructional flexibility, showing that tracking developmental progress and making targeted adjustments is crucial for supporting students' phonological and lexical-semantic development

Traditional spelling assessments may not fully capture a student's potential for future spelling development and highlight the need for more nuanced evaluation methods. Gosse et al. (2021) emphasized the value of nonbinary measures in identifying students likely to develop future spelling skills, even if their current spelling performance was not yet accurate. Their cross-sectional study revealed predictive patterns of spelling ability through repeated measurements, advocating for a shift away from traditional spelling tests. This aligns with the findings of McMurray (2020), who also highlighted the importance of flexible, evidence-based approaches to teaching and assessment in literacy. Both studies stress the need for assessments that accommodate students' developmental trajectories, enabling educators to better support their spelling and overall literacy development from an early age.

Addressing literacy difficulties in spelling and reading comprehension effectively requires the integration of research-based practices in the classroom. Tavşanlı and Kara (2021) investigated the impact of peer and self-assessment-based editorial study (PSABES) on the spelling and punctuation skills of fourth-grade students and revealed that students engaged in PSABES showed greater success in adhering to spelling rules and using punctuation correctly. Tavşanlı and Kara demonstrated that peer and self-assessment-based editorial study (PSABES) not only improves students' spelling and punctuation skills but also fosters a collaborative and motivating learning environment that enhances overall writing proficiency.

Similarly, Busch (2021) highlighted the potential of integrating real-world language use into classroom teaching to make spelling instruction more relevant and engaging. Both studies emphasize the value of socially oriented and collaborative approaches such as peer learning and contextualized teaching in improving spelling education. By fostering interaction and leveraging students' everyday communication practices, these strategies can make spelling and literacy instruction more effective and meaningful.

Long-term literacy programs have proven effective in enhancing learners' overall performance. Kim et al. (2023) evaluated the impact of MORE, a longitudinal content literacy intervention implemented from first to second grade. This program emphasized thematic content lessons and comprehensive reading practices, resulting in improved reading comprehension and mitigating the effects of the "summer slide". The authors highlighted the importance of continuous, engaging, and content-based instruction that aligns with students' interests and knowledge acquisition processes. Similarly, Tavşanlı and Kara (2021) demonstrated the benefits of structured peer learning in improving students' spelling and writing skills. Their findings,

consistent with those of Kim et al., emphasized the value of consistent, integrated strategies in fostering students' literacy development. Both studies emphasize that long-term, research-driven approaches through peer learning or thematic content integration create meaningful and sustainable improvements in spelling and reading comprehension. Peer learning and thematic content integration are particularly effective strategies when designed to engage students and build on their existing knowledge and interests.

Instructional Coherence and Educator Support

The teaching of morphology has become a cornerstone of literacy education in spelling and reading development. Levesque et al. (2021) introduced the Morphological Pathways Framework which demonstrates how PA and semantic understanding enhance spelling and reading proficiency. Tortorelli and Bruner (2022) extended this framework in the *Word Nerds* project where students used analogies and patterns in words to infer the spelling of unfamiliar words. The studies emphasize the importance of morphological knowledge in consolidating literacy skills enabling students to spell words they may not initially recognize.

In addressing specific challenges faced by children with dyslexia, Gosse et al. (2022) identified deficits in both spelling-related cognitive processes and motor processes involved in writing describing that children with dyslexia not only struggle with phonological and morphological processing required for accurate spelling but also exhibit difficulties with handwriting fluency, letter formation, and motor coordination. These cognitive and motor processing challenges emphasize the need for interventions that address these interconnected issues. The authors suggest that effective literacy support for children with dyslexia should

incorporate multisensory approaches that enhance both cognitive-linguistic skills and fine motor control, ensuring that spelling instruction is tailored to their unique learning needs.

Advances in neuroscience have provided valuable insights into the underlying neurological factors contributing to reading and spelling difficulties emphasizing the need for targeted interventions. Dębska et al. (2021) used functional magnetic resonance imaging to study children with reading and spelling difficulties finding reduced brain activation in regions critical for word analysis. Their findings highlight the neurological basis of literacy challenges and the importance of targeted interventions. Collectively, Gosse et al. (2022) and Dębska et al. reinforce the need for tailored, research-based instruction that incorporates morphological, phonological, and cognitive strategies. Such approaches are particularly vital for students with dyslexia or spelling difficulties as they provide the support needed to improve literacy skills effectively.

Summary and Conclusions

The study addresses the issue of poor spelling skills among K–8 students in a private school in Sacramento where 70% of students struggle despite structured literacy interventions. The research explores how educators implement SWI to support spelling development in students across the western United States. Through an extensive literature review, the study examines educators' perceptions of SWI and its effectiveness in improving spelling instruction. Recent studies were identified through various academic databases with a focus on research published within the last five years.

A literature search was conducted to explore educators' perceptions and practices regarding the use of SWI to improve the spelling abilities of K–8 students in the western United States. The search utilized databases such as OASIS, PubMed, JOSTOR, EBSCO, ERIC,

ProQuest, Scopus, and Google Scholar focusing on publications from the last five years. Key search terms included Structured Word Inquiry, spelling instruction, and MA. Boolean operators refined the search, narrowing results to studies addressing the application of SWI in elementary and middle school education. The identified studies informed the thematic discussions in the literature review which covered topics such as the introduction, historical background, efficacy, educators' attitudes, and comparisons with other spelling interventions.

The conceptual framework of the study is grounded in the work of Bowers and Kirby who introduced SWI as an inquiry-based approach integrating morphology, etymology, and phonology into spelling instruction. Research has shown that SWI enhances vocabulary, spelling accuracy, and decoding skills in students across different grade levels, particularly those with persistent reading difficulties. However, while SWI is considered a promising alternative to traditional phonics instruction, there is no systematic review examining its effectiveness for students with reading and spelling disorders. The study highlights ongoing debates about the limitations of phonics-based approaches and the need for evidence-based, structured spelling instruction.

Previous research comparing SWI to phonics-based interventions has shown mixed results. While some studies found that SWI improves MA and word reading, others suggest that phonics remains more effective for foundational reading skills. The study emphasizes the importance of understanding how educators implement SWI in real-world classroom settings to address spelling challenges. The research also acknowledges the critical role of educator training, PD, and instructional coherence in maximizing the benefits of SWI.

Additionally, the study explores the role of technology in supporting SWI-based literacy instruction. Digital tools such as morphological matrices, spelling feedback software, and inquiry-based learning platforms have been found to enhance PA, spelling accuracy, and word recall. However, research suggests that technology must be strategically integrated with evidence-based teaching practices to be effective.

Overall, I sought to bridge the gap between research and practice by analyzing educators' real-world experiences with SWI. By focusing on instructional implementation, student outcomes, and potential challenges, the study provides insights into whether SWI effectively improves spelling skills among students who struggle with traditional phonics-based methods. Building on the synthesis of research, Chapter 3 describes the methodology designed to systematically examine how SWI is implemented in educational settings and to evaluate its effectiveness in improving spelling outcomes for struggling learners.

Chapter 3: Research Method

The purpose of this basic qualitative study was to examine educators' experiences with implementing SWI to enhance spelling skills among K–8 students in the western United States. This study was designed to examine the persistent issue of spelling underachievement in the context of structured literacy interventions. Gaining insight into how educators perceive and apply SWI in their instruction offered valuable strategies for improving spelling outcomes and bridging the achievement gap. Chapter 3 details the research methodology, outlining the systematic approach used in this study. It includes key components such as research design and rationale, the role of the researcher, methodology, data analysis, issues of trustworthiness, and ethical considerations.

Research Design and Rationale

The research question guiding this study is:

RQ: What are educators' experiences with SWI for addressing spelling underachievement with K–8 students?

A basic qualitative methodology was adopted for this study. The use of qualitative methodology was appropriate for this study since the study described educators' experiences, perceptions, and actions regarding the use of SWI. Qualitative methodology enabled a deep, contextualized understanding of complex educational processes making it the most suitable approach for investigating how educators navigate and experience SWI in their instruction (Lim, 2024). Alternative methodologies were considered but rejected based on their unsuitability for this study.

A qualitative approach was selected as the most appropriate methodology to ensure alignment with the study's objective of exploring educators' experiences with SWI. A quantitative method was not adopted as it relies on numerical data for statistical analysis. Quantitative methods limit the ability to capture participants lived experiences and are more suitable for assessing variables and testing relationships (Taherdoost, 2022). Similarly, a mixed methods approach which combines qualitative and quantitative data was ruled out due to its complexity and the risk of compromising the depth of analysis needed to thoroughly examine educators' experiences (Dawadi et al., 2021). A purely qualitative approach best served the study's objectives and research question allowing for a rich and in-depth exploration of the phenomenon. The study ensured a comprehensive and nuanced understanding of educators' experiences which provided valuable insights into the implementation of SWI by employing a qualitative methodology.

A basic qualitative research design was chosen for this study. A qualitative research design focused on participants' attitudes, beliefs, and subjective experiences (Lim, 2024). Other qualitative designs such as phenomenology, case study, and grounded theory were considered but rejected due to irrelevancy to the study. Phenomenology focuses on identifying common patterns of experience within a particular phenomenon (Lindseth & Norberg, 2022). However, it is not suitable for this study as the goal is not to describe the overall experience of SWI but rather to explore educators' specific experiences with SWI. A single case study design that focuses on a bounded system, such as a school or district, was not chosen because this study captures perspectives from multiple educators across the western United States region (Kekeya, 2021). In addition, single case studies can extend over long periods of time. Similarly, a grounded theory

approach that develops theory from data was not used, as the study seeks to describe educators' experiences with SWI rather than generate a new theory (Charmaz & Thornberg, 2020). A basic qualitative research design was the most appropriate choice, as it effectively addressed the research question, relied on a single data source, and provided valuable insights into educators' experiences with SWI.

Role of the Researcher

I assumed the role of an observer-participant in this study to ensure an effective and balanced data collection process. I conducted semistructured interviews to gather insights into participants' experiences with SWI while maintaining an objective stance and minimizing bias. The observer-participant role allowed me to actively engage with participants to better understand their perspectives while avoiding undue influence on their responses (Müller et al., 2024). The observer-participant approach was essential to creating a comfortable environment that helped participants feel at ease as they shared their experiences. I effectively balanced engagement and objectivity by adopting an observer-participant role, yielding a richer, more valid understanding of educators' experiences with SWI.

I maintained a neutral and non-influential role throughout the study to uphold ethical research standards and ensure unbiased data collection. I had no personal or professional relationships with the participants. There were no supervisory, instructional, or other power dynamics that impacted on the educators' willingness to share their experiences. Maintaining researcher neutrality was crucial in minimizing the risk of coercion and fostering an environment where participants felt comfortable expressing their perspectives openly (Taquette & Borges da Matta Souza, 2022). Additionally, participation was entirely voluntary, with all participants being

explicitly informed of their right to withdraw from the study at any time to protect their autonomy. This study promoted ethical integrity, participant comfort, and the collection of authentic and reliable data by ensuring researcher neutrality and voluntary participation.

Measures were taken throughout the study to minimize potential bias and ensure the integrity and objectivity of the research findings. Reflexivity and bracketing were employed as key strategies to reduce bias. Reflexivity involved critically examining personal assumptions, values, and biases that could influence the research process (Olmos-Vega et al., 2022). I maintained a reflexive journal to document reflections and enhance accountability. Bracketing was used to ensure that the analysis remained centered on participants' experiences and perceptions. This process required me to set aside personal assumptions and focus solely on participants' viewpoints (Habibullah et al., 2023). Additionally, participants received \$25 in Amazon gift cards as an incentive to participate in the study. Halpern et al. (2021) noted that financial incentives can facilitate recruitment and reduce researchers' recruitment challenges. The study upheld objectivity, credibility, and ethical research standards, ensuring that the findings accurately reflected participants' experiences and were not influenced by external factors, by implementing the outlined strategies.

Methodology

Participant Selection

The participant selection process focused on educators with direct experience in SWI implementation to ensure the study effectively captured relevant insights. In qualitative research, the population refers to a larger group of individuals related to the research topic (Andrade, 2020). The population in this study included K–8 educators in the western United States who

have incorporated SWI into their teaching practice. The target population is a subset of this group, specifically educators actively using SWI to enhance students' spelling skills. Focusing on educators aligned with the study's objective of understanding their experiences, challenges, and insights regarding SWI implementation. The study generated meaningful, contextually relevant findings that contributed to understanding its effectiveness in improving spelling skills by selecting participants who directly engage with SWI.

A purposive sampling technique was employed in this study to select participants who could provide valuable insights. A purposive sampling technique enabled me to select participants with direct experience and a deep understanding of the issue, thereby ensuring the collection of rich, meaningful data (Campbell et al., 2020). This approach was particularly effective for gathering detailed insights into SWI implementation, related teaching practices, and the challenges educators face in applying this method. The study ensured that the collected data were highly relevant, comprehensive, and reflective of real-world experiences, thereby enhancing its credibility and depth through purposive sampling.

Participants were selected based on specific inclusion criteria to ensure they met the study's objective. These criteria included current employment as a K–8 educator in the western United States and active use of SWI in their instructional practices. These criteria ensured that participants had adequate knowledge of SWI to provide valuable insights into its application and outcomes. A sample size of 16 participants was used, as this number is suitable for a qualitative descriptive study to achieve data saturation (Hennink & Kaiser, 2022). Data saturation is a process in which no new themes or patterns emerge from the data, indicating that the study has covered all aspects of the issue (Braun & Clarke, 2022).

A structured recruitment process was implemented in a qualified participant pool. Potential participants were recruited from social media outreach, professional associations, schools, and recommendations from other professionals familiar with SWI strategies. Study materials included an invitation letter and an informed consent form, distributed via social media and emailed to educators across the western United States. I contacted the respondents who agreed to schedule an interview, sent the consent letter, and addressed any questions or concerns. The study ensured that participants were well-suited to provide meaningful insights contributing to a comprehensive understanding of SWI implementation by following this targeted recruitment strategy.

Instrumentation

This study used semistructured interviews as the primary data collection method. I developed an interview guide (see Appendix A) that allowed flexibility to adjust or add questions during interviews to gain deeper insights into participants' perceptions and experiences (Lim, 2024). A semistructured interview guide was developed based on the research question to ensure a focused and comprehensive exploration of educators' experiences with SWI. The interview guide consisted of semistructured, open-ended questions, allowing participants to share detailed narratives about their experiences with SWI in spelling instruction, including the challenges they encountered and the successes they achieved. Open-ended questions were essential for collecting rich, in-depth data that align with the study's objectives (Lim, 2024).

Procedures for Recruitment, Participation, and Data

Semistructured interviews were used as the primary data collection method to gain a comprehensive understanding of educators' experiences with SWI implementation. The

interviews focused on educators' experiences with applying SWI to enhance K–8 students' spelling performance in the western United States. An interview guide I developed ensured that the questions aligned with the research objectives while allowing greater depth in exploring participants' insights (Lim, 2024). This semistructured approach ensured comparability across interviews and allowed me to probe further as needed. Data collection was conducted through virtual interviews via Zoom. Participants included K–8 educators from the western United States. I was solely responsible for all aspects of data collection, including conducting interviews, recording and transcribing data, and analyzing the data. This study provided a rigorous, well-rounded exploration of SWI's impact on spelling instruction, offering valuable insights into literacy education research.

All semistructured interviews were conducted consistently and securely to ensure a structured and efficient data collection process. Each participant took part in a single interview ranging from 30 to 100 minutes. Data collection was dependent on participant availability. Follow-up interviews were not conducted, as additional information or clarification was not required from the initial interview.

All interviews were audio-recorded with participant consent, using Zoom's recording feature for virtual interviews. Detailed field notes were taken simultaneously to capture non-verbal behaviors and contextual details that may provide further insight into participants' experiences (Novotny et al., 2021). All collected data is stored on a password-protected device with access restricted solely to me to ensure data security and confidentiality. The study maintained a high level of accuracy, security, and ethical integrity, ensuring that participant responses were documented comprehensively while safeguarding their privacy.

Participants were identified through social media, professional contacts, school officials, and educational associations in the western United States region. I used email to share communications and Signwell document signing to send and receive consent forms with participants during the recruitment process. Participants were selected from among the individuals who responded.

I expanded the search to neighboring states because the initial recruitment efforts did not yield sufficient participants. The secondary recruitment requested referrals through snowball sampling from the initial participants to increase the number of eligible educators. Snowball sampling is a method in which current participants refer to new participants from their social or professional networks to take part in the study (Chenane & Hammond, 2021). These recruitment strategies ensured a sufficient sample of educators, allowing for a comprehensive exploration of their experiences with SWI implementation.

Participants were fully informed about the study's objectives and future plans before the interviews began to ensure transparency and trust. Each participant received a clear explanation of the study's purpose and was assured that their participation would be acknowledged without disclosing their identity. Additional interviews were not conducted because further clarification was not needed from the previously provided information. Participant identities remain confidential. The participants were provided with contact information should they wish to raise any concerns or ask questions in the future. The participants were informed of their right to contact me to withdraw from the study. Ensuring ethical transparency strengthened the reliability of the research findings.

Data Analysis Plan

A structured approach was employed to effectively analyze the qualitative data collected in this study and ensure accurate, in-depth interpretation of educators' experiences with SWI. Thematic analysis was used to categorize and interpret the data (Christou, 2022). This method is particularly effective for examining the complexity of educators' experiences and identifying similarities and differences in their perspectives. The data analysis process followed a systematic approach to ensure the accurate identification and development of themes.

First, I transcribed the interview recordings verbatim to gain a thorough understanding of the content and context (Braun & Clarke, 2022). Next, coding was conducted using Atlas.ti software where data was segmented into meaningful components relevant to the research question. Open coding was applied as the first stage of the analysis to preserve objectivity and allow themes to emerge from the raw data. Open coding was the initial process of breaking down data into discrete segments and assigning labels or codes to each segment (Braun & Clarke, 2022). This coding was done without preconceived categories, allowing for an inductive exploration of the data (Brailas et al., 2023). Open coding was appropriate because it allowed me to remain grounded in participants' responses and ensured the analysis remained open to new insights and patterns without imposing predefined themes (Braun & Clarke, 2022). In this study, open coding helped identify the key concepts and ideas from the educators' experiences with SWI.

After completing open coding, axial coding was applied to organize the codes into broader categories. Axial coding involved identifying relationships among the codes and linking them together into cohesive groups or categories that represent more significant concepts (Braun & Clarke, 2022). This process was necessary to refine and simplify the data into a manageable

structure that identifies underlying themes. Axial coding helped me better understand how various elements within the data were connected and was appropriate for this study because it allows a deeper exploration of the interrelations among educators' experiences with SWI, such as instructional challenges, successes, and perceptions.

Themes emerged from the final review of the axial codes. The themes were developed by aggregating the codes into larger, overarching categories that captured the essence of the data. These themes were refined by carefully reviewing the axial codes and ensuring that they reflect the major patterns and relationships identified in the data. The process of theme creation involved grouping related codes and categories and ensuring they represent meaningful, distinct concepts related to educators' experiences with SWI.

A structured approach was used to identify and refine themes reflecting participants' experiences with SWI, ensuring a thorough and accurate analysis of the data. The themes were carefully reviewed and refined to ensure they were distinct, meaningful, and did not overlap (Lim, 2024). This refinement process enhanced the validity and coherence of the thematic framework (Naeem et al., 2023). I elaborated on each theme, supporting the analysis with direct quotes from participants to illustrate their experiences in the research section. Discrepant themes were identified during data analysis. Identifying these themes enhances the trustworthiness of the research by ensuring that the analysis captures the full range of experiences (Allsop et al., 2022). This systematic and methodical approach ensured that all themes that emerged from the data were accurately identified while preserving the authenticity of participants' perspectives.

Trustworthiness

Trustworthiness in qualitative research is critical for producing credible and meaningful findings. Qualitative research employs trustworthiness criteria, whereas quantitative research relies on statistical measures of reliability and validity. Four elements of trustworthiness ensured the quality and rigor of this study: credibility, transferability, dependability, and confirmability. These elements were essential for enhancing the trustworthiness of qualitative research (Noble & Smith, 2025).

Credibility was a key focus in validating the accuracy and authenticity of the collected data to ensure the study's trustworthiness. Credibility refers to the authenticity and accuracy of the data in representing participants' views (Stahl & King, 2020). Spending extended time with participants during semistructured interviews also helped me gain a deeper understanding of their experiences with SWI.

Transferability is the qualitative methods version of generalizability. Transferability is defined as the extent to which the study's findings can be applied to other settings or people (Munthe-Kaas et al., 2020). Detailed descriptions of the setting and participants' demographics can increase the likelihood that results are relevant to similar people or settings (Olmos-Vega et al., 2022). Furthermore, recruiting participants from diverse educational backgrounds and teaching contexts provided a broader perspective on SWI implementation, potentially increasing the transferability of the results.

An audit trail was maintained to enhance dependability by documenting all research activities, including data collection, coding, theme development, and interpretations (Amin et al.,

2020). Any modifications made during the research process were recorded in the audit trail to facilitate replication by future researchers.

Confirmability was maintained through a reflexive journal to record my personal thoughts, potential biases, and decision-making processes throughout the study (Nyirenda et al., 2020). The dissertation chair reviewed the interview transcript and provided feedback. Additionally, direct quotes from participants are incorporated into the findings to demonstrate that the results are derived from their responses rather than my interpretations.

By addressing trustworthiness, this study produces credible findings that accurately represent educators' experiences with SWI and contribute meaningful insights to the field of literacy education. Integrating trustworthiness into the research framework accurately captured educators' experiences with SWI. The insights gained not only contribute to understanding SWI implementation in literacy education but also provide a foundation for future research, policy development, and improvements in K–8 instruction.

Ethical Procedures

Necessary approvals were obtained before initiating recruitment and data collection to ensure ethical compliance and proper authorization for participant engagement. Participants were approached after seeking approval from the Institutional Review Board (IRB) at Walden University. The consent form was distributed to the participant via email sent by the Signwell document signing program after the interview appointment was set. No interviews were conducted without the participant's consent, and all consent forms were signed by me and returned to the participant via email before the interview. All consent forms are saved on a secure, password-protected device along with audio recordings and transcriptions. The study

upheld research integrity, protected participants' rights, and ensured compliance with institutional and organizational guidelines by following these ethical procedures.

The rights and well-being of participants were safeguarded throughout the study. At the time of recruitment, participants received clear information about the study's objective, activities involved, and any potential risks and benefits. Participation was entirely voluntary, with no consequences for withdrawing at any point. The informed consent process ensured that participants fully understood their rights and what was expected of them. Digital consent forms were obtained prior to the study. All recruitment materials explicitly stated that participation was voluntary. To promote inclusivity and fairness, plain language was used to minimize cultural and linguistic bias during recruitment. Additionally, since I have no supervisory authority over participants, power dynamics did not influence participation, ensuring a neutral and ethical research environment.

Ethical considerations in conducting the study focused on protecting the participants' information and ensuring it was not disclosed to any other party. All interviews were conducted in a safe and comfortable manner via Zoom at a time convenient to the participants. No participant information was directly linked to the data, and participants' names were replaced with codes during analysis. Reflexivity journaling helped me avoid biases and practice objectivity throughout the research process.

All data collected is kept confidential and stored securely to prevent unauthorized access. All audio recordings and transcripts are stored on a password-protected computer only known to me. All reports and publications based on this study have the participants' identifiable information removed to ensure their privacy. The collected raw data will be retained for 5 years

after the study's termination, in accordance with the university's guidelines, after which it will be disposed of. This process safeguards participants' rights, anonymity, and welfare, and promotes the integrity of the research process by adhering to these ethical guidelines.

Summary

This basic qualitative study explored educators' experiences in implementing SWI to improve spelling skills among K–8 students in the western United States. The study addressed the persistent issue of spelling underachievement by examining educators' perceptions and applications of SWI in their instructional practices. A basic qualitative research design captured educators' experiences, attitudes, and perceptions.

I assumed the role of an observer-participant conducting semistructured interviews to gather detailed insights while minimizing bias. Reflexivity and bracketing were applied with financial incentives provided to encourage participation. Participants included K–8 educators from the western United States with at least some experience implementing SWI. A purposive sampling method was used to recruit 16 participants via social media, professional contacts, school officials, and educational associations, with snowball sampling used as needed.

Data collection and analysis included semistructured Zoom interviews. Interviews were audio-recorded with detailed field notes taken to capture non-verbal cues and contextual details. Thematic analysis was employed to code, categorize, and identify patterns in the data, ensuring data saturation. The study incorporated an audit trail and journaling to manage potential researcher bias.

The study received IRB approval from Walden University prior to initiating recruitment efforts. Participants were fully informed of the purpose, procedures, potential risks, and their

right to withdraw at any time. No identifying information was disclosed in reports or publications. All raw data is securely stored for 5 years before being permanently deleted.

This study provided meaningful insights into SWI implementation and its impact on spelling instruction by employing a rigorous qualitative methodology, ethical research practices, and robust data analysis. Findings contribute to literacy education research, inform instructional strategies, and support educators in improving spelling outcomes for K–8 students. With the methodological framework established and the integrity of the research process affirmed, Chapter 4 presents the findings from this study and offers a detailed analysis of participants' experiences and the themes that emerged across the data to address the guiding research question.

Chapter 4: Results

The purpose of this basic qualitative study was to examine educators' experiences with implementing SWI to enhance spelling skills among K–8 students in the western United States. This study was designed to address the persistent issue of spelling underachievement in the context of structured literacy interventions. Gaining insight into how educators perceive and apply SWI in their instruction may offer valuable strategies to improve spelling outcomes and bridge the achievement gap. The results are organized around the research questions that guided this study and are supported by direct quotes from participants to illustrate key patterns and experiences. The research question was as follows.

RQ. What are educators' experiences with SWI for addressing spelling underachievement with K–8 students?

SWI was developed by Bowers and Kirby (2010) and served as the conceptual framework for this study. SWI is a discovery-based approach that integrates morphology, etymology, orthography, and phonology to help students analyze word structure and uncover spelling and meaning cues even within words traditionally considered irregular (Bowers & Kirby, 2010; Colenbrander et al., 2021). The framework promotes learner-driven exploration by guiding students to discover word origins, patterns, and rules while building a deeper understanding of written language (Bowers, 2021; Hastings & Trexler, 2021). SWI also provides educators with strategies to explicitly teach irregular spelling while helping students understand the logic behind orthographic structures and has the potential to improve spelling proficiency and overall literacy skills. (Bazis et al., 2022; Graham et al., 2021; Murphy & Diehm, 2020)

In Chapter 4, I discussed the data collection and analysis process. I will describe the study setting and the participants' demographic characteristics. The steps taken to gather and analyze the data are detailed. The findings are then presented in detail, structured around the research question. Evidence of trustworthiness, including credibility, transferability, dependability, and confirmability, will be discussed, followed by a summary of Chapter 4.

Setting

Conditions

On November 11th, 2025, Walden University's IRB approved my application to conduct my research study within the Central Valley of Northern California (Approval Number 11-10-25-1164008). I immediately began reaching out to SWI educators by posting details to various SWI Facebook groups. While respondents were willing to participate in my study, they were outside of the approved geographical region. I submitted a Change in Procedures form to the IRB to expand the geographical region from the Central Valley of Northern California to California. I was granted approval on November 20th, 2025. Recruitment efforts resumed through Facebook and shared email addresses. However, the number of participants in California was too small to conduct a viable study. I then requested that the IRB expand the geographic region from California to the western United States. I was granted approval on January 5th, 2026, and immediately began contacting participants in this region to schedule Zoom interviews. Of the 19 participants who expressed interest in an interview, 16 appointments were confirmed between January 5th and January 22nd, 2026.

Demographics

The study involved 16 K–8 teachers ($N = 16$). They were all involved in elementary or middle-grade settings in the western United States, where students with spelling challenges received instruction in SWI as a component of literacy. All personal data were redacted to ensure confidentiality and participants were identified by ID (P01–P16). There were 15 female and one male participants. The educators noted the use of SWI in whole-class lessons during the daily ELA block, in small-group interventions, and in 1:1 tutoring sessions. These variations in context are relevant to the study design since most participants taught students who received Tier 2/3 supports, or IEP services in addition to general ELA instruction. Participants' exposure to SWI ranged from early education, where students were just beginning to add word sums and matrices, to more sophisticated practitioners who had perfected routines over several years. Reported preparation included district or school PD, coaching and professional learning communities, and self-directed study via texts, webinars, conferences, and practitioner communities. Many educators emphasized ongoing learning about morphology, etymology, orthography, and phonology to strengthen instructional explanations and student investigations. Table 1 summarizes the demographic details of the participants.

Table 1*Participants' Demographic Information*

Pseudonym	Gender	Teaching experience	Experience with SWI instruction
P01	F	31 years	11 years
P02	F	16 years	10 years
P03	M	35 years	5 years
P04	F	8 years	8 years
P05	F	35 years	14 years
P06	F	7 years	5 years
P07	F	16 years	6 years
P08	F	20 years	10 years
P09	F	24 years	4 years
P10	F	26 years	13 years
P11	F	25 years	10 years
P12	F	23 years	10 years
P13	F	26 years	9 years
P14	F	15 years	5 years
P15	F	7 years	7 years
P16	F	25 years	5 years

Data Collection

Participation in this study included semistructured interviews with currently practicing K–8 educators who were implementing SWI with students. I used purposeful, criterion-based sampling to identify educators who (a) taught K–8 students and (b) used SWI as part of a classroom, small group, or 1:1 intervention. Social media, professional networks, and word of mouth were used to circulate an invitation outlining the study's purpose, time commitment, risks/benefits, and confidentiality protections. Interested educators contacted me via email to ask questions and express their interest in participating. Sampling sought variation across roles (classroom teachers, interventionists, coaches, special educators), grade bands (K–8), and school types (public, charter, independent) to support transferability. Interview dates and times were

confirmed via email, with Zoom invitations sent to the participant immediately. Interviews were conducted over a 3-week span of January 2026.

Eligible volunteers received an IRB-approved information sheet and were provided electronic consent prior to participation. Participation was voluntary and could be discontinued at any point without penalty. To protect identity, each educator was assigned a pseudonymous ID (P01–P16); names of schools and districts were not recorded in the dataset. I stored consent forms separately from data on encrypted, access-controlled drives. I conducted one interview per participant using a semistructured guide aligned to the RQ. Core questions included the following content: (1) how SWI was understood and enacted (e.g., word sums, matrices, morphology/etymology/phonology integration); (2) student engagement and classroom talk; (3) spelling and broader literacy outcomes; (4) implementation conditions (time, PD, curriculum/administrative alignment, materials); (5) differentiation and equity for students receiving special education services; (6) assessment and progress monitoring; and (7) teacher learning and identity.

The interviews were audio-recorded with participants' permission. Individual interview durations ranged from 19 minutes (P16) to 1 hour 41 minutes (P01), with an average of approximately 52 minutes and a median of about 53 minutes across the sample. All interviews were transcribed, producing single-spaced transcripts that ranged from 10 to 43 pages per participant. The interviews totaled approximately 829 minutes of participant discussion time (16 interviews) and 303 single-spaced transcript pages (a mean of about 29 pages per interview). These totals reflect substantial variation in interview length, for instance shorter conversations such as P16 (19 minutes; 16 pages) and P11 (30 minutes; 13 pages) alongside extended, in-depth

conversations such as P05 (1:13; 21 pages), P08 (1:11; 21 pages), P03 (1:15; 23 pages), and P01 (1:41; 32 pages). The longest transcripts by page count were P01 (32 pages) and P13 (43 pages), reflecting richer detail despite similar clock times to other cases. All interviews were scheduled outside of instructional hours to limit disruptions and to allow educators to describe their SWI contexts in depth. The resulting dataset provides a sufficiently information-rich basis for the thematic analysis reported in Chapter 4.

Immediately after each interview, I drafted structured field notes capturing contextual details (setting, interruptions, notable affect, emphasis) and reflexive memos documenting emerging insights, potential biases, and questions to revisit in analysis. These notes were date-stamped and stored with the project's audit trail to support transparency between data collection and analysis.

All digital materials (audio, transcripts, notes, memos) are stored in a password-protected, access-restricted project directory. A master linkage file connecting real names to participant IDs was kept in a separate location. I am the only one who has access to the full dataset. Audio recordings and transcriptions are archived. Sixteen interviews were completed ($N = 16$); no participants withdrew, and no interviews were excluded. Minor technological interruptions (e.g., brief connectivity drops) occurred in a small number of sessions and were mitigated by repeating questions or extending the interview time; no data was lost. By the 16th interview, no substantive new codes relevant to the RQ were identified, and existing codes were well exemplified across participants, roles, and grade levels. Data collection was therefore closed at 16 interviews. Table 2 summarizes the interview details.

Table 2*Interview Details*

Pseudonym	Interview location	Interview date	Interview duration	Number of transcript pages (single-spaced)
P01	Zoom	Jan 5, 2026	1hr 41 minutes	32 pages
P02	Zoom	Jan 9, 2026	1hr 7 minutes	26 pages
P03	Zoom	Jan 9, 2026	1hr 15 minutes	23 pages
P04	Zoom	Jan 11, 2026	49 minutes	14 pages
P05	Zoom	Jan 13, 2026	1hr 13 minutes	21 pages
P06	Zoom	Jan 16, 2026	39 minutes	13 pages
P07	Zoom	Jan 16, 2026	59 minutes	15 pages
P08	Zoom	Jan 16, 2026	1hr 11 minutes	21 pages
P09	Zoom	Jan 16, 2026	47 minutes	15 pages
P10	Zoom	Jan 19, 2026	40 minutes	12 pages
P11	Zoom	Jan 19, 2026	30 minutes	13 pages
P12	Zoom	Jan 21, 2026	33 minutes	14 pages
P13	Zoom	Jan 21, 2026	58 minutes	43 pages
P14	Zoom	Jan 21, 2026	41 minutes	10 pages
P15	Zoom	Jan 22, 2026	51 minutes	15 pages
P16	Zoom	Jan 22, 2026	19 minutes	16 pages
TOTAL			829 minutes	303 pages
AVERAGE			52 minutes	29 pages

Note. All the interviews took place in January 2026

Data Analysis

I followed Braun and Clarke's (2022) reflexive thematic analysis (RTA) to analyze 16 semistructured interviews with K–8 educators about their experiences using SWI to address spelling underachievement. The analysis focused on what participants actually said in their own words rather than imposing outside ideas. When needed, I looked beneath the surface of responses to identify educators' deeper beliefs about spelling and teaching. Throughout the analysis, themes were treated as patterns of shared meaning organized around a central concept rather than as topics that simply recur. This approach is consistent with RTA which emphasizes active and interpretive analysis (Braun & Clarke, 2022). The steps are as follows:

Familiarization

Familiarization refers to systematic immersion in the dataset and involves reading, re-reading, annotating, and memoing to gain a holistic grasp of content, context, and early analytic hunches (Braun & Clarke, 2006). In this study, I de-identified transcripts, read each transcript multiple times, and created initial memos noting recurring ideas such as word sums/matrices, student talk, time/PD supports, and assessment routines, as well as questions for later testing. Early memos also captured reflexive notes about my assumptions, such as expectations that morphology supports memory, to keep them visible and contestable as coding progressed. This phase established a data-close understanding and a running trail of insights to revisit in later phases (Braun & Clarke, 2022).

Generating Open Codes

Coding is the analytic labeling of meaningful features of the data relevant to the research question. RTA is iterative, flexible, and researcher-generated rather than rule-bound (Braun & Clarke, 2006; 2022). Using line-by-line, inclusive coding, and with the aid of Atlas.ti software, I assigned short descriptive labels to meaning units that spoke to the research question (e.g., “build word matrix,” “student confidence,” “protected minutes,” “dictation checks”). Codes were adjusted and combined or separated as new details emerged. This process reflected the ongoing, evolving nature of reflexive thematic analysis rather than a single, fixed review of the data. Table 3 depicts how initial codes were generated from the interview dataset. The full list of codes is shown in Appendix B.

Table 3*Generating Open Codes From the Data Set*

Open codes	Corresponding participant quotes
Word sums/ matrices	P04: “just kind of a smaller word family. So for something like that, I don't make a matrix or a resource for but, yeah, I'm making them all the time. And I mean, I started making the resources when I started taking classes, right? Because there was other than Pete Bowers book, there was really nothing out there, right? Yeah, and even that needed to be broken down, in my opinion, yeah.”
Base/Affix analysis	P011: “I'm just saying put your base word plus any prefixes, suffixes, yeah, I remembered. I think it was Rebecca. I think is the one that where I first got that, you know, base word plus is rewritten with that arrow.”
Student engagement	P02: “Yes, the confidence level that the you know that it's we're engaging in this together. I have kids who would have very high fatigue levels. They would read a paragraph and they'd be done and start miscue in all over the place. We would take turns reading, and they would pick up more and more of the reading with more confidence. So, yeah, I've noticed a big difference in what they're willing to engage in, as opposed to, you know, just what they're capable of reading at the time that I meet with them.”
Assessment /Monitoring	P08: “[I use] high frequency word project, like spreadsheet, where you can check off and track what high frequency words they know, and then I also use dictation sentences, and I will measure their correct word sequences with dictation sentences. So those are my three main measures. Also some students are working on, like writing essays and things like that. And I'll then I'll bring in like this Oregon State writing rubric.”

Note. Open codes generated directly from the interview dataset

After generating the open codes, axial codes were generated. This was done by combining open codes that shared the same conceptual meaning. Table 4 shows how axial codes were formed.

Table 4*Combining Initial Descriptors Into Open Codes to Form Axial Codes*

Axial code	Open code	Initial descriptors
Structured Linguistic Analysis Practices	Word sums and matrices routines	word sum; word matrix; build, test, revise; compose/decompose; spelling/meaning connection; prove/disprove
	Morphological analysis (base/affix/root)	base; root; morpheme; affix; prefix; suffix; bound/free; derivation; inflection; allomorph
	Etymology investigations	etymology; origin; Latin; Greek; Old French; borrowings; historical spelling; cognates
	Phonology/orthography alignment	phoneme; grapheme; phonology; orthography; correspondence; pattern; stress; syllable
	Inquiry practices and artifacts	notebook; hypothesis; investigate; analyze; notice and wonder; morpheme wall; anchor chart; evidence
Student Affect and Engagement	Curiosity, agency, and ownership	curiosity; agency; choice; ownership; joy; persistence; risk-taking; self-efficacy
	Confidence and motivation	confidence; motivation; participation; willingness to try; reduced anxiety
	Discussion Protocols	metalinguistic talk; discussion; justify; argue; explain; peer-to-peer; classroom norms
	Collaborative inquiry	group work; partner talk; roles; shared investigation; gallery walk
Student Learning Outcomes	Spelling accuracy and generalization	accuracy; generalization; conventional spelling; error analysis; strategy use

Axial code	Open code	Initial descriptors
	Transfer to reading and writing	transfer; application; writing samples; reading integration; vocabulary growth
	Decoding/encoding and comprehension links	encoding; decoding; fluency; comprehension; morphology awareness
	Evidence of progress	growth; improvement; benchmarks; indicators; student artifacts
Differentiation and Access	ELL/MLL supports	multilingual learners; language objectives; visuals; sentence frames; oral rehearsal; cognates
	Dyslexia and SpEd accommodations	dyslexia; IEP; 504; explicit routines; multisensory; repetition; assistive tech
	Grouping/tiering	small group; pull-out; push-in; Tier 2; MTSS; RTI; targeted intervention
	Scaffolds and access	scaffolding; chunking; manipulatives; modeling; gradual release
Assessment and Progress Monitoring	Formative checks	whiteboards; exit tickets; quick writes; think-aloud; observation notes
	Dictation and inventories	dictation; spelling inventory; word lists; pattern probes; running records
	Notebooks and portfolios	learning notebook; portfolio; artifact review; reflection
	Pre/post assessments and rubrics	pre-test; post-test; rubric; checklist; proficiency levels; data walls
Systemic and Structural Conditions	Time and scheduling	time constraints; pacing; block schedule; minutes allocated; competing initiatives
	Curriculum/pacing alignment	scope and sequence; alignment; integration; adoption; program fit

Axial code	Open code	Initial descriptors
	Administrative and community support	administrator buy-in; district policy; parent communication; leadership support
Professional Learning and Collaboration	Professional development/coaching and materials	professional development; coaching cycles; lesson study; planning time; materials; resources
	Fidelity and collaboration	fidelity; PLCs; co-planning; shared artifacts; decision log; peer debrief; lesson study; sharing practice;
	Coaching and mentoring	coaching; mentoring; walkthrough feedback; modeling; goal setting
Teacher Growth and Transformation	Mindset shift (rules to reasoning)	belief shifts; rules vs. reasoning; inquiry stance; epistemic move
	Content knowledge growth	morphology knowledge; etymology knowledge; phonology knowledge; orthography concepts
	Reflective practice and confidence	reflection; self-assessment; journaling; confidence; efficacy

Note. Open codes within each axial category are listed in the order they emerged during analysis of initial descriptors.

Searching for Themes

Theme development involves collating related axial codes into themes that capture patterned meaning around a central organizing idea rather than merely topics that recur (Braun & Clarke, 2006). I collated related axial codes into themes and drafted a brief organizing idea for each by asking what shared meaning held the cluster together (e.g., "SWI as meaning-first inquiry," "engagement as metalinguistic talk," "implementation conditions as enablers and

constraints"). Themes were developed as needed, including time and scheduling, PD and coaching, curriculum alignment, and materials. All supporting extracts were gathered under each theme to test scope and coherence (Braun & Clarke, 2022). Table 4 shows how axial codes with the same conceptual meaning were combined to form themes.

Table 5

Axial Codes Combined to Form Themes

Themes	Axial codes
Educators experience SWI as a meaning-first approach that improves K–8 spelling by integrating morphology, etymology, orthography, and phonology through word sums and matrices.	Structured Linguistic Analysis Practices
Educators report that SWI boosts student engagement and metalinguistic talk, helping sustain effort when tackling challenging spelling tasks	Student Affect and Engagement Student Learning Outcomes
Educators observe that SWI improves spelling accuracy and facilitates the transfer of spelling skills to reading and writing performance for all students.	Student Learning Outcomes Differentiation and Access Assessment and Progress Monitoring
Educators find that SWI effectiveness increases when there is protected instructional time, professional development opportunities, appropriate materials, and administrative alignment.	Student Learning Outcomes Professional Learning and Collaboration
Educators use ongoing assessment within SWI to monitor and guide spelling improvement in K–8 students	Student Learning Outcomes Assessment and Progress Monitoring
Educators experience SWI as reshaping their professional identity and knowledge, contributing to sustained, effective spelling remediation for K–8 students.	Teacher Growth and Transformation

Note. Axial Codes are combined to form themes.

Reviewing Themes

This step tests internal coherence (Do extracts within a theme fit the same organizing concept?) and external distinctiveness (Is each theme clearly different from others?) while refining boundaries and dataset fit (Braun & Clarke, 2006). I examined whether extracts within each theme shared a central idea and whether themes were meaningfully distinct from one another. Misfitting extracts were moved or reserved as discrepant cases and overlapping themes were merged or redefined (e.g., "time" and "pacing" were unified under "time and scheduling"). Consistent with reflexive thematic analysis, support across participants was assessed to avoid single-case interpretations with counts treated as descriptive signposts rather than inferential statistics (Braun & Clarke, 2022).

Defining and Naming Themes

Defining/naming themes requires writing concise analytic definitions that state the theme's essence and scope, clarifying what is included/excluded, and selecting clear, audience-friendly names (Braun & Clarke, 2006). I wrote concise, action-oriented definitions for each final theme and identified the central organizing concept in one or two sentences. Theme names were refined for clarity and accessibility as recommended by Braun and Clarke (2022).

Producing the Report

Reporting weaves analytic narrative with vivid data extracts that evidence the claimed pattern (Braun & Clarke, 2006). Quotations illustrate meaning while counts are used descriptively rather than inferentially in reflexive thematic analysis. I completed this stage of thematic analysis by writing this chapter of the dissertation. The report includes multiple themes that directly address the research question and each theme is supported by illustrative quotes

from participants. Tables are also used throughout the report to present the results.

Results

This study explored educators' experiences with implementing SWI for spelling instruction in K–8 students in the western United States. Six major themes emerged from the data to address the central research question: What are educators' experiences with SWI for addressing spelling underachievement with K–8 students? Table 6 summarizes the research question and corresponding themes.

Table 6

Themes Addressing the Research Question

Research question	Themes	Number of Participants who Supported Theme (<i>N</i> = 16)
What are educators' experiences with SWI for addressing spelling underachievement with K–8 students?	Theme 1: Educators experience SWI as a meaning-first approach that improves K–8 spelling by integrating morphology, etymology, orthography, and phonology through word sums and matrices.	16
	Theme 2: Educators report that SWI boosts student engagement and metalinguistic talk, helping sustain effort when tackling challenging spelling tasks.	16
	Theme 3: Educators observe that SWI improves spelling accuracy and facilitates the transfer of spelling skills to reading and writing performance for all students	16
	Theme 4: Educators find that the effectiveness of SWI increases when there is protected instructional time, professional development opportunities, appropriate materials, and administrative alignment.	9
	Theme 5: Educators use ongoing assessment within SWI to monitor and guide spelling improvements in K–8 students.	10
	Theme 6: Educators experience SWI as reshaping their professional identity and knowledge, contributing to sustained, effective spelling remediation for K–8 students.	14

Theme 1: Educators experience SWI as a meaning-first approach that improves K–8 spelling by integrating morphology, etymology, orthography, and phonology through word sums and matrices

This theme captures how teachers experience SWI as a meaning-first approach that makes spelling explicable through routines, especially word sums, word matrices, and the integrated study of morphology, etymology, orthography, and phonology. All 16 participants contributed evidence to this theme. The theme answers the research question by specifying the concrete instructional moves teachers use to address spelling underachievement: guiding students to decompose and compose words, trace origins, align grapheme–phoneme relationships, and prove why conventional spellings make sense rather than memorizing lists.

Teachers described daily investigative routines that render the logic of spelling visible and repeatable for students. One educator, P13, explained how word-family sorting anchors morphemic structure: “And, other times, I’ll give them, like, a bunch of words that share a base and ask them to sort... so then they figure out the family... familial relationships.” Others emphasized pushing beyond surface features to origin, deepening explanations for spellings, as P15 reported, “And then push yourself later to investigate a word’s origin... where it originated from, if it was Greek or Latin or whatnot.” The work is cumulative and content-rich, as P05 reflected, “[there] were a lot of things I did at the same time.... So I don’t have as good a knowledge of Greek as I do have Latin.” Framing the big picture, another participant, P01, contrasted rule-recall with principled analysis, saying, “global orthographic system picture, as oppos[e]d to memorizing... matrices and word sums and suffix and conventions...” Collectively, these accounts show students engaging in structured inquiry such as sorting,

composing/decomposing, and origin-checking to generate evidence-based explanations for spelling.

Educators also described how metaphors, definitions, and breadth of use helped students internalize the analytic stance that SWI requires. One teacher, P08, captured morphemic layering vividly, saying, “Words are like a Russian nesting doll. There are parts inside parts... So action. What are the morphemes in action?” Teachers tied that layering to historical knowledge that motivates inquiry, as P03 commented, “History of the alphabet, history, you know how it developed... Okay, that's in my cryptography class. We do that.” Etymology was used precisely to sort meaning families and justify spellings, as P14 reported:

I mean, there's even like, there's even a leader in the reading intervention field, whose whose work I greatly admire, who, as a person I find like very inspiring. But this particular person teaches within her well-regarded book, and all you know, her lectures that we never compound Greek and Latin basis. Tell me about the word television, then tell us Latin, right? Tela is Greek, and vise is Latin. Those are compounded.

Finally, educators noted that this approach scaled across grades and contexts, not just isolated pull-outs, as P04 mentioned:

My in terms of structure, word inquiry or just so for structure, word inquiry, it is generally kindergarten. Typically, they don't, you know, they it doesn't really come up as they have an issue until first grade, unless there's history, unless there's unless I've seen them for speech and language. And parents are, you know, dyslexic or you know they're showing early signs, but I would say typically, first through high school, with the majority of them being in elementary school.

Together, these statements depict teachers cultivating an investigative habit of mind, naming parts, tracing histories, and applying consistent routines, so students can articulate why a spelling is the logical outcome of a word's structure and story.

In summary, participants experienced SWI as a set of teachable, repeatable investigations that replace memorization with proof-seeking about form–meaning relationships. By centering word sums, matrices, and etymology/phonology links, teachers reported that students learned to justify spellings and to see them as coherent rather than arbitrary. This shared emphasis on analysis explains why educators view SWI as a practical pathway for remedying K–8 spelling underachievement through reasoning rather than rote memorization.

Theme 2: Educators Report That SWI Boosts Student Engagement and Metalinguistic Talk, Helping Sustain Effort When Tackling Challenging Spelling Tasks.

This theme captures educators' accounts of how SWI increases students' willingness to participate, talk about language, and persist with difficult word work. Teachers reported a rise in curiosity, confidence, and metalinguistic talk as students took ownership of investigating how words work. All 16 participants contributed to this theme. The theme answered the research question by showing how SWI affects participation and stamina during spelling tasks. Teachers consistently linked SWI to visible boosts in classroom energy, agency, and dialogue. One educator, P16, described whole-group momentum when inquiry frames a lesson, saying:

So, oftentimes, we will just find a word that we notice have many different affixes and talk about them. Sometimes it's diving a little bit deeper into a prefix or suffix that they are not familiar with.... Comparing, just comparing what we are supposed to be doing in our adopted curriculum, and when it's a word study day, they're all about it, and they are

all engaged and all participating. I would say even they ask, can we not do this today?

Can we go back and do the other? Which I love, and sometimes I'm like, no, but we'll try to squeeze in a little bit at the end, so...For sure, the engagement goes up, yeah.

P11 highlighted how curiosity catalyzes discovery and shared enjoyment: “if I've got a curious student, or one who will make connections on his own, then then we really have fun.”

P06 emphasized how recurring routines channel attention into metalinguistic reasoning. The participant noted:

Depends on the time of the year, and like, what our focus is literacy-wise... we'll think about the single final non-syllabic E. And so we'll do a bunch of practice word sums with bases that have a single final non-syllabic E, and then adding different suffixes and noticing what happens.

Finally, teachers noted how leadership climates that value inquiry can normalize talk about why spellings make sense, as P10 commented, “It depends if a school administrator is a curious, lifelong learner of the truest sense... So anyone who's a thinker is going to see, ‘Whoa, everyone thinks spelling is crazy and it doesn't make sense,’ but this explains it...” These accounts collectively indicate that the inquiry stance of SWI authorizes questions, solicits pattern finding, and transforms word study into a common intellectual project.

Teachers, too, linked engagement to confidence and perseverance, particularly in those students who had formerly shunned spelling. An educator, P02, talked about the transition where students started as tentative participants who would then become sustained contributors: “I've got children who are getting A's and B's who couldn't.” P05 emphasized the need to maintain supportive adult partnerships to keep learners engaged. The participant stated, “one of the things

I also do is I help advocate with parents for their students who've been diagnosed with dyslexia and need accommodations or need special ed services. And I'll go into these IEP meetings with them." Moreover, P09 reflected on how earlier emphases made it hard for some learners to lean into talk, which SWI began to change: "Well, the first thing to say is, I didn't work on spelling per se before... spelling wasn't the focus. It was always reading. And, you know, kids could be pretty engaged if you have a good connection with them." Finally, teachers pointed to the way explicit discussion of reasoning steps keeps students oriented to the process rather than guessing.

P12 commented:

It is, and some of it's so wrong. I mean, there's so much phonology and structured word inquiry, and I think some people just don't want to see it right. Like, I'm always like, look, just because we talk about it fourth doesn't mean it's fourth of importance. It just means everything's got 25% of importance, right? This is just the fourth step. It's not the, you know, it's not the least important step. It's just the fourth step. And I think people just don't like, they don't hear that right?

Together, these considerations imply that engagement is not just enthusiasm but is maintained by routines, adult scaffold, and gradual discussions about the next steps.

Overall, teachers reported that SWI generated more engagement and increased metalinguistic dialogue, as it turned word learning into interactive enquiry. The confidence and stamina boost was correlated with predictable routines that invite noticing, naming, and justifying, and the supportive adult formations that retain the students at the work. These circumstances contribute to the reasons why educators consider that SWI may be effective in

maintaining effort when working on difficult spelling problems with K–8 students who could not engage before.

Theme 3: Educators Observe That SWI Improves Spelling Accuracy and Facilitates the Transfer of Spelling Skills to Reading and Writing Performance

The third theme focuses on teachers' reports that SWI enhances spelling precision and broader literacy, specifically reading fluency/comprehension and writing. The theme was supported by data derived from all 16 respondents. This theme answers the research question by showing that when students learn to analyze and justify spellings, they carry those same strategies into decoding/encoding while reading and into drafting and revising while writing.

Teachers tied SWI directly to observable gains in reading ease, spelling accuracy, and productive classroom checking. One participant, P09, emphasized reading fluency gains that followed meaning-first analysis: "I find it interesting that I mean, obviously comprehension is one thing, but I find it interesting that the reading becomes easier and the fluency improves." Another participant, P05, described growth that shows up in day-to-day performance, not just on spelling lists: "because I, like you said, you invest so much time in learning how to do this and reading about it, but for me in particular, it's how it improves their spelling." In addition, the teachers indicated that parents observed notable changes as the learners were able to explain words in a more confident fashion, as P11 commented:

No, no, not a bit. What I explained to parents when I start working with a student is that we're going to work on understanding how words are built so that students understand reading and spelling better, yeah, yeah, okay.

In classrooms, teachers documented progress with simple, frequent checks that track accuracy and fluency, as P08 commented, “I use reading passage, like informal reading passages, to track their reading accuracy and fluency.” Together, these accounts suggest that SWI’s emphasis on explaining why spellings make sense equips students with transferrable strategies that show up during reading and routine performance monitoring.

Participants also described transfer into writing. Students were noted to apply word knowledge as they draft and revise their writing. One teacher, P01, explained how sustained word work supported a dyslexic writer’s growth. The participant said:

She just inhaled books, but in her writing, you know, I can remember specific pieces that showed how she started to apply what we were doing in SWI... that was a dyslexic student that I tutored for about two and a half years.

Another participant, P03, linked SWI to concrete written output in class: “it's putting pen to paper...The other thing you could do is, you know, give them a writing task and see how they are checking the words that are going in there.” Teachers also pointed to broader patterns of improvement, students making progress they had not made under more memorization-heavy routines, as P10 noted, “Um, I don't have data to back that, but I have. I do believe, from the classroom perspective, that some students who didn't move before under traditional approaches now they're making that progress that they didn't make before.” Finally, several educators described students spontaneously checking and correcting in writing as a sign that analysis has become habit, as P02 commented, “And, you know, when they're drafting, I see them pause and go back-because now they're thinking about how the word is built before they move on.”

Collectively, these statements suggest that SWI's habits of analysis to compose, decompose, and prove transfer with students into authentic writing and revision.

In general, there were notable positive gains in spelling and spillover to reading and writing when teachers used evidence-seeking routines with SWI. The mechanism was not rote recall but reasoning: learners analyzed, checked, and justified, and those same habits supported decoding/fluency and revision. These converging reports assist in explaining why the respondents perceive SWI as a promising pathway to correcting K–8 spelling underachievement and enhancing overall literacy outcomes.

Theme 4: Educators Find That the Effectiveness of SWI Increases When There is Adequate Instructional Time, Professional Development Opportunities, Appropriate Materials, and Administrative Alignment.

This theme describes how time in the schedule, aligned curriculum/mandates, access to materials, and leadership/administrative support shape whether SWI can be implemented deeply enough to affect spelling. The theme was supported by data derived from nine out of 16 participants. The theme answers the RQ by showing that the conditions around instruction, minutes, pacing, PD/coaching, materials, and district alignment either enable or constrain educators' ability to use SWI consistently with underachieving spellers.

Teachers emphasized that time and curriculum alignment are the bedrock of sustained SWI. One participant, P01, described the pull of required programs alongside the desire to teach through inquiry: "So we, we were responsible for teaching, you know, the things we needed to, but we were also obligated to use the district adopted language arts curriculum." Others pointed to how mandated pacing compresses the minutes available for investigations, as P16 noted, "I'm

in the classroom already, and I don't have as much time as maybe others would, so that's my biggest challenge." Curriculum mandates were a recurring tension, as P16 commented, "I think classroom teachers have to juggle, because they do have curriculum that they are mandated to teach from." Across districts, the same pressure surfaced in different forms; as one educator, P04, put it, "Yeah, it's, it's, it's not a great form for me in my context... Not that I know everything. I just need more time." Taken together, these statements show that SWI flourishes when minutes are protected and programs/pacing allow inquiry, and it thins out when time is fragmented by competing requirements.

Educators also tied professional learning, materials, and administrative stance to day-to-day feasibility. Several described building PD pathways and momentum at the school level, as P03 reported, "sure, so I'm going to make my teachers next year do some professional development, for sure, to get them knowledgeable and passionate and interested, so it'll be nice to get it started." Others viewed accumulated PD as the fuel for consistent practice, as P02 noted, "Yeah, well, I found that in Palo Alto, I was lucky... and I'm really appreciating the huge amount of professional development that I have." Materials and resources were another practical hinge, as P04 noted, "there's, I think the challenge is, there's no really consistent place yet... there's a lot of resources, and there's a lot of crap out there. So that answer your question, yes, yeah." Finally, participants noted that administrators who understand inquiry literacy help normalize SWI's focus, as P06 stated, "School administrators, I think, have a very positive orientation toward development and a project-based inquiry sort of focus." Together, these narratives indicate that coherent PD, available material to engage with, and leaders who appreciate inquiry are the levers that prevent SWI from becoming a one-off enrichment.

In summary, teachers found the effectiveness of SWI to be dependent upon conditions: safeguarded minutes, coherent curriculum and pace, available resources, and advocating management. Where such conditions were available, teachers reported regular inquiry, richer talk, and more enduring application to spelling. Where they were thin, SWI appeared sporadic and more difficult to sustain, highlighting that meeting K–8 spelling underachievement needs not only effective pedagogy but time, tools, and administrative alignment to implement it adequately.

Theme 5: Educators use Ongoing Assessment Within SWI to Monitor and Guide Spelling Improvement in K–8 Students.

This theme describes how educators integrate continuous assessment into their SWI practice to track spelling progress among students and modify their instruction. Teachers recorded gains in orthographic reasoning and standard spelling difficulties using notebooks, dictation/inventories, running records, and rubrics/checklists. Ten of the 16 participants added to this theme. This theme addressed the research question by explaining how progress is monitored and fed back to instruction. The theme shows that teachers do not encounter SWI as activities over and above all other activities, but as a guide for seeing, understanding, and acting on change in spelling and other literacy abilities in learners as they progress.

Teachers outlined a framework of formative checks to track orthographic reasoning and spelling development. In classrooms, this trend was observable. As P08 noted, “high frequency word project, like spreadsheet, where you can check off and track what high frequency words they know, and then I also use dictation...” Assessment practices described by teachers are closely correlated with SWI routines and demonstrate whether students are analyzing instead of

guessing or memorizing. P01 described her utilization of small, focused tasks to determine whether students comprehend word structure: “give them an assessment of maybe seven words all in the same family, and have kids write the word sums for how they think that word would be spelled.” In this case, the scoring is about how students construct word sums, not just whether they reproduce correct spellings. P05, emphasized the idea of spelling as problem solving, not just remembering, indicating that she would “assess a student's spelling more on how they were able to figure it out than if they just knew how to spell words. But they did know how to spell more words clearly.” Teachers also pulled outcome data from other literacy measures to corroborate what they saw in SWI tasks. As P03 explained, “She just took assessment this week, and her score was fourth grade at 61 correct words per minute with 98% accuracy.” P03 reflected on school expectations for assessment and how SWI fit into that culture:

So when I was at [my school], that was a big deal, you know, because they had to do some sort of assessment. They were not as assessment crazy as the public schools were, but they definitely needed to do something. And one of the things we tried was silent reading and conversation. And what kinds of things came up in the silent reading, what kinds of things did the kids want to talk about? How did they go about it? You know, it was, it was totally assessing where they went and how what they had already learned, and how they applied it and how they questioned it. It was just, it was all.

Collectively, these illustrations demonstrate how teachers can use SWI-specific activities and broader literacy indicators in tracking how learners think about words not merely whether they could reproduce a spelling once.

Respondents also used cumulative artifacts and criteria in making progress visible and actionable. This was observable across classrooms. P16 said, “I mean, we have progress monitoring that goes with our curriculum, so I think that it lends itself, but it isn't necessarily something...” Additionally, participants were open regarding the tensions and constraints they experienced around existing assessment instruments and the relationship with SWI. One educator, P03, explained the challenge in using oral reading metrics alone to justify SWI work: “but it's really hard to be dependent on their oral reading fluency scores to validate what the work that I'm doing, right? Yeah, typically, I can find success, and it just takes me a minute. You know what I mean? I don't. Some students, depending on where they are, they don't, it takes a while to start seeing a change in oral reading fluency.” Another educator, P09, expressed skepticism towards standardized measures for some students, noting, “I don't know, I never know what to think of those things like, how could he even take the test? Oh, wow, yeah, yeah.” Participants also compared the SWI emphasis in reasoning with more conventional test expectations. As P156 bluntly remarked, “Yeah, I haven't heard anybody at our school say, I wish that we had a spelling test.” Even the rhythm of school life came through in comments like, “All right. Well, I'll let you get back to your progress reports.” (P06), suggesting that teachers must strike a balance between formal reporting and day-to-day interpretive work they perform within SWI lessons. Together, these remarks imply that although teachers value data, they also view SWI as requiring more nuanced, richer methods of interpreting students' knowledge than a score can provide.

To summarize, teachers applied ongoing assessment in SWI in tracking and guiding spelling improvement, using both on SWI-specific tasks (like word-family assessments and

notebooks) and on broader reading measures. They tended to value evidence that showed how students approached words, how they built sums, justified patterns, or transferred strategies into reading, over traditional spelling tests alone. At the same time, they were wary of metrics that did not capture morpho-orthographic reasoning or that seemed mismatched to their students' needs. This theme, therefore, extends the answer to the RQ by emphasizing that SWI's contribution to addressing K–8 spelling underachievement is tightly bound to how teachers observe, interpret, and act on multiple forms of assessment evidence over time.

Theme 6: Educators' Experience SWI as Reshaping Their Professional Identity and Knowledge, Contributing to Sustained, Effective Spelling Remediation for K–8 Students.

This theme describes how learning and implementing SWI reshaped educators' professional knowledge, roles, and sense of identity as literacy teachers. Implementing SWI shifted teachers from rule-recall to inquiry, growing content knowledge and confidence to facilitate investigations. Fourteen out of 16 participants spoke about changing how they think about spelling, how they seek training, and in some cases how their careers and leadership roles evolved because of SWI. The theme answers the RQ by showing that educators do not experience SWI as a “technique” added to existing practice, but as a transformational learning process that supports sustained, effective remediation of spelling underachievement.

Participants stressed that SWI both required and supported continuous PD, often through formal training and self-directed study, thereby altering their perceptions of their role. Participant P11 explained her PD pipeline briefly: “I would say, through learning quest, they're really good about offering ongoing tutor training. It's not always SWI, but they will make things available and through them.” Another emphasized the scope of her training in SWI and the mentors who

influenced her practice: “With SWI, I've done a lot of training with [PB]. I've seen, done training with [FH] as well, and [RL], who have been amazing and really inspiring.” (P13). These opportunities were not uniformly satisfying; one educator, P04, noted, “I think across the board, everyone I've talked to has taken the DTI training and wasn't happy with it”, which underscores that teachers are actively evaluating and curating their learning rather than passively receiving programs. Others linked their own learning directly to their instructional choices, as P05 commented: “because I, like you said, you invest so much time in learning how to do this and reading about it, but for me in particular, it's how it improves their spelling. Great.” Collectively, these quotes depict educators who were building specialized SWI skills, becoming more discerning about PD, and basing their professionalism on the perceived effect on students.

SWI influenced not only classroom practice but also the career trajectories and identities of some participants, including entry into private tutoring, special schools, and leadership positions. P02 recounted a lengthy curve of practice and self-investment: “I used to be in private practice and I did private practice for a long time, Orton Gillingham and discovered, discovered [PB] probably 12 years ago.” That experience directly led to a new role centered on dyslexic learners: “yeah, well, after private practice, I got asked to join a small private school for dyslexic learners and did that for years” (P16). Another participant, P11, described her path from classroom work to founding and leading a school shaped by SWI principles:

Yeah, I know because when I went to that first class, I did by [GC]. She had a little card deck, the grapheme deck, yes, and then kind of Yeah. Just tried to look for resources, like, how can I implement this? And there really wasn't much in 2015” (P11).

Educators across districts talked about their expanded networks and communities of practice, as P16 commented appreciatively: “Yeah, well, I found that in [PA], I was lucky... and I’m really appreciating the huge amount of professional development that I have.” Taken together, these descriptions imply that SWI is not limited to lesson plans; it is incorporated into how teachers construct their professional identities, select roles, and guide others.

In general, teachers found SWI to be redefining not only what they know about spelling, but also who they can be as literacy professionals. With consistent practice, critical engagement with PD, and iterative practice, they gained a clearer understanding of morphology, etymology, and orthography and developed identities as researchers and supporters rather than just as implementers of a spelling program. To others, this education led to new professional positions, including private practice, specialty schools, and leadership in administration, focused on serving struggling spellers. This theme, therefore, addresses the research question by revealing that SWI’s contribution to K–8 spelling remediation is sustained not only by student strategies but by teachers’ evolving knowledge and professional identity, which keep the work alive and responsive over time.

Evidence of Trustworthiness

The trustworthiness of this study was upheld through the consistent implementation of credibility, transferability, dependability, and confirmability strategies outlined in Chapter 3. Credibility was established through extended engagement with participants during semistructured interviews and the incorporation of direct participant quotes throughout the findings to ensure that interpretations authentically reflected their experiences with SWI implementation. Transferability was supported by providing detailed descriptions of the research

setting, participant demographics, and educational contexts, along with recruiting participants from diverse teaching backgrounds across the western United States to broaden the range of perspectives represented. Dependability was maintained through a comprehensive audit trail that documented all research activities, including data collection, coding decisions, and theme development, to ensure transparency and support the potential replication of this study. Confirmability was addressed through reflexive journaling to bracket researcher bias and record decision-making processes throughout the study, complemented by dissertation chair review of the initial interview transcript to ensure that findings were grounded in participant data rather than researcher interpretation. No significant adjustments to the planned trustworthiness strategies were required, as the original design proved sufficient to produce rigorous and credible findings.

Summary

The purpose of this basic qualitative study was to explore educators' experiences with implementing SWI for spelling instruction among K–8 students in the western United States. Data were collected from 16 K–8 teachers through individual semistructured interviews and analyzed using thematic analysis. A single research question guided the study: What are educators' experiences with SWI for addressing spelling underachievement with K–8 students? Six major themes emerged from the data in response to this question. The first theme revealed that educators experienced SWI as meaning-first instruction that improved K–8 spelling by integrating morphology, etymology, orthography, and phonology through tools such as word sums and matrices. The second theme indicated that educators perceived SWI as a means of boosting engagement and metalinguistic talk while sustaining effort with challenging spelling

content. The third theme demonstrated that educators observed improvements in spelling accuracy that transferred to reading and writing performance. The fourth theme revealed that educators viewed the effectiveness of SWI as contingent on several implementation conditions, including protected instructional time, PD, aligned curriculum and pacing, accessible materials, and supportive leadership. The fifth theme showed that educators used ongoing assessment within SWI to monitor and guide spelling improvement among K–8 students. The sixth theme illustrated that educators experienced SWI as reshaping their professional identity and knowledge in ways that sustained effective K–8 spelling remediation. Chapter 5 discusses these findings, along with their implications, recommendations, and conclusions.

Chapter 5: Discussions, Conclusions, and Recommendations

This study investigated educators' experiences with SWI implementation in the western United States to enhance spelling abilities among learners, especially those who have difficulty with conventional spelling instruction. The results of this basic qualitative research study are useful in understanding the advantages, obstacles, and practicality of implementing SWI instruction. In this chapter, I summarized the findings and interpreted their significance for the research question: What are educators' experiences with SWI for addressing spelling underachievement among K–8 students? In Chapter 5, I discuss an interpretation of the findings, the study's implications and limitations, and offer suggestions for how SWI could be better integrated into spelling instruction. The chapter ends with a summary of how the study has contributed to understanding literacy instruction, especially in addressing spelling difficulties among learners in K–8 classes.

Summary of Findings

The findings of this study highlight the multifaceted benefits of SWI as a pedagogical approach to spelling instruction. Educators noted that SWI functions as a meaning-first spelling method that guides learners in understanding the structure and logic underlying word spelling rather than relying on rote memorization. Instructional tools such as word sums and word matrices were employed to deconstruct words, illuminating their meaning and fostering a deeper appreciation of spelling patterns and orthographic rules. Participating educators emphasized that SWI enabled learners to connect spelling with meaning which resulted in heightened engagement and more active participation with the material. This finding aligns with Bowers and Kirby's (2010) observation that morphological awareness positively influences spelling performance.

Both Bowers and Kirby and Colenbrander et al. (2021) identified morphological awareness as a critical factor in the acquisition of spelling and reading skills. Collectively, these insights reinforce the value of meaning-centered approaches in literacy instruction and suggest that SWI holds considerable promise as an evidence-based strategy for supporting diverse learners.

A second notable finding concerned the marked improvement in student participation and the emergence of metalinguistic discourse within SWI classrooms. Educators observed that SWI generated increased interest and enthusiasm among students, particularly those who had previously struggled with traditional spelling instruction. As implementation progressed, learners began to take greater ownership of their learning while demonstrating a genuine curiosity in investigating word meanings and spellings. This observation is consistent with Bowers (2021), who found that SWI fosters a more participatory and inquiry-based learning environment. Furthermore, the development of metalinguistic discourse in SWI instruction cultivated critical thinking skills, empowering learners to articulate and defend their reasoning about spelling conventions and to apply these insights across both written and spoken language. These findings suggest that SWI not only supports linguistic development but also nurtures curiosity and critical thinking skills.

The third significant finding revealed that SWI not only enhanced spelling accuracy but also facilitated the transfer of spelling skills to broader reading and writing contexts. Educators reported that students who engaged with SWI demonstrated improved word decoding during reading and measurable gains in their written expression. These results are consistent with those of Georgiou et al. (2021), who found that learners with stronger morphological awareness excelled in both spelling and reading exercises. The emphasis on SWI's word structure and

meaning enabled learners to link their knowledge of spelling to their broader literacy achievements, thereby supporting the mutual dependence between spelling and reading.

The findings of this study indicate that the effectiveness of SWI extends beyond instructional quality alone and is shaped by the broader educational context in which it is implemented. Although participants reported that SWI supported improvements in students' spelling development, they also emphasized that its success depended on several contextual factors, including time constraints, alignment with existing curricula, and access to sustained professional learning. Educators in this study explained that implementing SWI effectively required dedicated instructional time within the school schedule as well as ongoing PD to ensure that teachers could apply the approach with fidelity and confidence. These findings underscore the critical role of administrative support and resource allocation in facilitating successful SWI implementation (Davis, 2025). Similarly, Hastings and Trexler (2021) emphasized that professional growth and institutional support are essential to the successful adoption of new instructional practices. Without these supports in place, the effectiveness of SWI may be diminished, as reflected in participants' descriptions of the challenges they faced when integrating SWI alongside other curricular demands. Overall, these findings suggest that while SWI holds considerable promise as an instructional approach for improving spelling, its impact may be constrained when the instructional and professional conditions necessary for implementation are not adequately supported.

A final finding of the study was that ongoing assessment served a critical role in monitoring students' spelling development and informing instruction. Participants described using a range of assessment methods, including word lists, dictation activities, and formative

checks, to evaluate student progress in spelling over time. These assessment practices provided valuable insight into students' learning and enabled educators to make instructional adjustments based on identified needs. This finding is consistent with Hastings and Trexler (2021) who reported that frequent assessment within the SWI framework helped educators evaluate the effectiveness of their instruction and support students' continued spelling growth. These findings suggest that continuous assessment is an essential component of effective SWI implementation as it allows educators to both monitor student progress and refine instruction in response to student performance.

Overall, this study's findings indicate that SWI is an effective instructional approach for addressing spelling difficulties among K–8 students. Participants described SWI as strengthening spelling development through meaning-based strategies, increasing student motivation, and supporting the transfer of spelling knowledge to other areas of literacy. These outcomes suggest that SWI has the potential to promote not only spelling growth but also broader literacy development. At the same time, the findings show that SWI's effectiveness depends on several key conditions, including sufficient instructional time, ongoing PD, and strong administrative support. These results are consistent with the existing literature and highlight the importance of systemic support in fully realizing the benefits of SWI. The findings underscore the need for organizational and instructional structures that enable educators to implement SWI effectively to maximize its impact on students' spelling and literacy achievement.

Interpretation of Findings

The findings of this study suggest that SWI offers a meaningful alternative to traditional spelling instruction by emphasizing the underlying structure of words. Rather than relying

primarily on rote memorization, SWI engages students in morphological, etymological, orthographical, and phonological analysis to develop a deeper understanding of spelling. One central finding was that educators viewed SWI as a meaning-first approach to spelling instruction. Participants described SWI as shifting the instructional focus from memorizing isolated word lists to understanding the structure and meaning of words. Using word sums and matrices, students analyzed and manipulated roots, prefixes, and suffixes to enable them to see how words are constructed. Educators reported that this process fostered a deeper connection to spelling by situating words in their linguistic and historical contexts. For example, P04 explained that examining word families helped students recognize “familial relationships” among words, which in turn made spelling patterns and conventions more comprehensible. This finding aligns with Bowers and Kirby’s (2010) conceptualization of SWI as an approach that promotes a richer understanding of words through inquiry rather than through the memorization of arbitrary rules. Overall, these findings indicate that SWI supports a more conceptually grounded approach to spelling instruction, helping students develop meaningful and transferable understandings of how words work.

Being conceptually grounded is significant because it highlights a clear distinction between SWI and more traditional approaches to spelling instruction. Conventional spelling instruction often emphasizes rote memorization and phonics-based exercises which may support short-term performance but do not always help students internalize the underlying principles of spelling. In contrast, this study's findings suggest that SWI promotes deeper learning by emphasizing morphological and etymological understanding. Bowers (2021) and Colenbrander et al. (2021) argued that instruction grounded in morphology and etymology supports longer-term retention

and encourages a more analytical approach to language. Such outcomes are not consistently associated with traditional spelling methods. Participants in this study similarly reported that students were not simply memorizing spellings but were learning to reason through spelling patterns using logic and word structure. For example, P15 explained that students began to understand why certain words are spelled the way they are, particularly when words could be traced to Latin or Greek origins which reduced the sense of irregularity or unpredictability in spelling. These experiences illustrate the value of SWI in helping students construct meaningful knowledge about spelling rather than relying solely on memorization. The finding suggests that SWI may strengthen spelling development by fostering deeper conceptual understanding, which in turn can contribute to broader literacy growth.

The findings further suggest that SWI may be especially effective in increasing student engagement and promoting metalinguistic discussion during spelling instruction. Participants reported that students who had previously struggled with spelling, particularly those who were less responsive to conventional spelling activities became more actively engaged during SWI lessons. Educators attributed this increased engagement to the inquiry-based nature of SWI which invites students to investigate word origins, identify patterns, and form hypotheses about relationships among words. Participants reported that students made more active, sustained contributions to word study discussions suggesting that SWI fosters an interactive, intellectually stimulating learning environment. For example, P02 observed that students who had once been disengaged became consistent participants in discussions about words and their structures. This finding is consistent with Hastings and Trexler (2021) who argued that the inquiry-based design of SWI encourages students to take ownership of their learning and supports the development of

student agency. In addition, participants consistently described SWI as promoting metalinguistic talk, as students were expected to justify their thinking and explain their reasoning about word structure. P05 noted that SWI encouraged students to reflect on how they arrived at an answer rather than simply recalling the correct spelling from memory demonstrating how the approach may support critical thinking and self-reflection. This finding indicates that SWI not only supports spelling development but also creates opportunities for deeper engagement, student agency, and meaningful metalinguistic dialogue.

Increased engagement influences how students perceive and experience spelling instruction. Rather than viewing spelling as a repetitive or discouraging task students may see it as an intellectually engaging process of discovery and problem-solving. Bowers (2021) found that inquiry-based approaches such as SWI can foster deeper engagement in literacy learning; an outcome that may be especially beneficial for students with learning difficulties. By moving away from drill-based instruction and encouraging students to investigate words in greater depth, SWI fosters a learning environment where curiosity, confidence, and self-efficacy can develop. In this way, SWI not only supports spelling development but also helps reshape students' attitudes toward literacy learning in more positive and empowering ways. Overall, this finding suggests that the value of SWI extends beyond academic skill development to include students' motivation, engagement, and confidence as learners.

Another important finding of this study was that SWI supported the transfer of spelling knowledge to both reading and writing. Participants reported that students who engaged in SWI not only improved spelling accuracy but also demonstrated growth in their ability to read and write words more effectively. This finding is consistent with Georgiou et al. (2021) who found

that greater morphological awareness was associated with stronger performance on both reading and spelling measures. In this study, educators explained that SWI's emphasis on word structure and meaning helped students make more explicit connections among spelling, reading, and writing. For example, P09 reported that students' reading became easier and more fluent as they developed a stronger understanding of word families and morphological structures through SWI instruction. This cross-domain benefit underscores the interconnected nature of language skills. It suggests that spelling should not be viewed as an isolated ability, but rather as one component of broader literacy development. Participants also described evidence of transfer to writing. As P08 noted, students began "checking the words that were going in there" during drafting and revision which indicated that spelling knowledge was being actively applied within the writing process. Overall, this finding suggests that SWI may serve as a valuable instructional approach not only for improving spelling performance but also for strengthening reading, writing, and overall literacy development through the integration of language-based skills.

An additional finding of this study was that contextual factors particularly time allocation, PD, and administrative support played a critical role in determining the effectiveness of SWI implementation. Participants consistently emphasized that the success of SWI depended not only on the instructional approach itself but also on the conditions that supported or constrained its use in practice. Educators identified limited instructional time and competing curricular demands as major barriers to effective implementation. For example, P16 explained that the lack of dedicated time for SWI instruction often led to the approach being deprioritized in favor of other mandated programs. Participants also noted that successful implementation depended on access to appropriate resources, instructional materials, and professional learning

opportunities. P05 emphasized that SWI's effectiveness was closely tied to the availability of materials and ongoing PD. This finding is consistent with Hastings and Trexler (2021) who argued that professional learning and collaboration with colleagues are essential for the successful adoption of new instructional practices. In addition, participants highlighted the importance of administrative alignment explaining that support from school leadership particularly through adequate instructional time and allocating resources was necessary to sustain SWI implementation over time. Overall, this theme points to the broader institutional conditions required to support innovative instructional practices and underscores the importance of adopting a systemic approach to literacy reform.

The final finding of this study was that ongoing assessment is a fundamental component of effective SWI implementation. Participants consistently described continuous evaluation as essential for monitoring students' spelling development and for informing instructional decisions throughout the learning process. Educators identified several assessment practices for tracking student growth, including word inventories, dictation activities, and formative checks. These measures enabled teachers to reflect on students' spelling progress and adjust instruction in response to emerging needs. This finding is consistent with Bowers (2021) who emphasized the importance of frequent assessment within the SWI framework to ensure that students are making progress in their understanding of word structure and spelling patterns. Participants also noted that assessments provided insight not only into students' spelling accuracy but also into their developing metalinguistic understanding of words. This ongoing feedback loop was described as valuable for identifying areas where students needed additional support and for maintaining a flexible instructional approach that could respond to students' changing needs. Overall, this

finding underscores the importance of continuous assessment in sustaining effective SWI instruction and in supporting both student progress and responsive teaching.

In conclusion, this study's findings provide strong support for the effectiveness of SWI in addressing spelling underachievement among K–8 learners. Participants' experiences suggest that SWI promotes a deeper understanding of spelling by moving beyond memorization and emphasizing the structure, meaning, and historical development of words. The findings also highlight the value of SWI in fostering student engagement, encouraging metalinguistic discussion, and supporting the transfer of spelling knowledge to other areas of literacy. At the same time, participants emphasized that successful implementation depends on adequate instructional time, sustained professional learning, and administrative support. These findings directly address the research question by indicating that SWI not only strengthens students' spelling abilities but also contributes to broader literacy development particularly when implemented in educational contexts that value inquiry, critical thinking, and ongoing professional growth. Overall, this study suggests that SWI has the potential to serve as a powerful and meaningful approach to spelling instruction when the necessary instructional and administrative supports are in place.

Implications

Implications for Practice

The findings from this study suggest that SWI may be both feasible and effective for addressing spelling underachievement among K–8 students when implemented as an ongoing instructional practice rather than as a one-time enrichment activity. Participants described SWI as supporting spelling development through meaning-based inquiry that integrates morphology,

etymology, orthography and phonology through instructional routines such as word sums and matrices. Educators associated these routines with increased student engagement and more durable learning outcomes. These findings are consistent with prior research indicating that morphology-informed instruction can strengthen spelling and broader literacy outcomes by making word structure more visible and meaningful to learners (Bowers & Kirby, 2010; Levesque et al., 2021). Participants also reported that student interest increased when instruction emphasized discussion, reasoning, and collaborative inquiry which aligns with the inquiry-based orientation described in SWI scholarship (Hastings & Trexler, 2021). In addition, because educators connected SWI to improvements in reading fluency and writing performance, the findings point to a broader instructional implication: spelling should not be treated as an isolated skill but rather as part of word study within a comprehensive literacy framework (Georgiou et al., 2021). At the same time, the study revealed that the effectiveness of SWI depends heavily on the conditions under which it is implemented as participants emphasized that adequate instructional time, sustained professional learning, access to materials, and administrative alignment were necessary for SWI to be implemented with the consistency and depth required to benefit students. Overall, these findings suggest that SWI holds substantial promise as an instructional approach for improving spelling and literacy development particularly when supported by the institutional and professional conditions needed for successful implementation.

Implications for Educators

The findings of this study are relevant to classroom teachers, interventionists, and literacy specialists who may implement SWI routines that emphasize explanation and justification of spelling rather than memorization. These results suggest that educators can apply SWI

effectively by establishing predictable inquiry cycles in which students construct word sums, develop matrices for high-utility bases, and use morphological relatives to justify grapheme choices during spelling and reading tasks. This recommendation is supported by research indicating that morphology-based instruction helps learners connect meaning and spelling thereby strengthening literacy development over time (Bowers & Kirby, 2010; Levesque et al., 2021). Participants in this study also reported increased student engagement and persistence when students were encouraged to participate in metalinguistic discussion and collaborative reflection suggesting that instructional discourse should be considered a central component of SWI lessons rather than an incidental feature. This finding aligns with research identifying SWI as an inquiry-based model that supports student agency through collaborative analysis of language (Hastings & Trexler, 2021). In addition, SWI may help educators promote transfer by connecting word investigation to authentic reading and writing tasks such as asking students to reason through word families during revision or to decode unfamiliar words in connected text; an approach consistent with evidence showing that morphological awareness is associated with both spelling and reading achievement (Georgiou et al., 2021). Finally, the findings support the integration of ongoing formative assessment into SWI routines through brief dictation tasks, word-sum construction activities, and reviews of student work samples enabling educators not only to monitor spelling accuracy but also to understand how students are reasoning about words which reflects the broader value of assessment-informed spelling instruction (Daffern & Fleet, 2021). Overall, these findings suggest that SWI can serve as a practical and instructionally rich framework for improving spelling and supporting broader literacy development when it is implemented with intentional inquiry, discussion, and formative assessment.

Implications for School Leaders and Administrators

The findings of this study also have important implications for principals, literacy coaches, and district leaders suggesting that SWI is most likely to be implemented successfully when schools provide instructional time and establish coherent support systems that provide pacing guides and instructional programs. Participants identified time as the most common barrier to implementation and indicated that school schedules should provide regular, sustainable opportunities for inquiry-based word study within the literacy block. Administrative support was also described as essential as educators reported that SWI implementation was stronger when school leaders understood the purpose of inquiry-based routines and aligned instructional expectations and materials with that approach. This interpretation is consistent with the literature, which emphasizes that inquiry-based frameworks require ongoing educator learning and schoolwide coherence to support consistent implementation (Hastings & Trexler, 2021). The findings further suggest that leadership-level implementation can be strengthened through investment in PD, instructional coaching, and collaborative planning that help educators build the linguistic knowledge needed to teach SWI confidently which aligns with research on research–practice partnerships and professional learning in spelling instruction (Tortorelli & Bruner, 2022). Because participants also reported uneven access to materials and challenges with curriculum fit, school and district leaders may further support SWI by curating vetted resources, establishing shared language for common routines, and encouraging the collaborative development of instructional material so that individual educators are not left to build implementation systems independently. Overall, these leadership actions may strengthen

implementation fidelity while still allowing educators the flexibility to adapt SWI routines to grade-level expectations and student needs.

Implications for Policy and Decision Makers

The findings of this study also have implications for policymakers and district-level decision-makers suggesting that efforts to improve spelling achievement may require policy shifts that position spelling and word study as central components of literacy rather than peripheral skills. Participants' reports of transfer from spelling instruction to reading and writing support literacy models that integrate spelling with vocabulary development, decoding, and composition, consistent with research emphasizing the role of morphology in literacy learning (Levesque et al., 2021). The findings further suggest that policy decisions may support implementation by investing in sustained professional learning focused on language structure and by adopting instructional policies that allow schools to incorporate SWI routines without penalizing educators for deviating from tightly scripted pacing guides. In addition, because participants emphasized the importance of ongoing assessment that captures students' reasoning, educational systems may benefit from expanding assessment practices beyond weekly spelling tests to include diagnostic measures that reflect growth in morphological analysis and orthographic understanding (Daffern & Fleet, 2021). Policymakers may also strengthen implementation by supporting research–practice partnerships that connect instruction with continuous improvement efforts as collaborative opportunities have been shown to enhance spelling instruction and student learning outcomes in educational settings (Tortorelli & Bruner, 2022). Overall, these findings suggest that policy-level support for integrated literacy instruction, sustained professional learning, and more comprehensive assessment systems may be necessary

to maximize the potential of SWI in improving spelling and broader literacy achievement. (Tortorelli & Bruner, 2022).

Limitations of the Study

Transferability and Geographic Scope

The primary limitation of this study is transferability. The findings were generated from educators working in the western United States and the instructional conditions, student demographics, and policy contexts of this region may differ from those in other geographic areas. Because literacy programs and state-level requirements vary across jurisdictions, implementing SWI in other settings may involve different challenges or supports. Although the sample size of 16 participants was appropriate for a basic qualitative design focused on educators' experiences, it limits the extent to which the findings can be generalized beyond this group. Therefore, the results should be interpreted as context-specific insights into educators' experiences with SWI rather than as universally applicable conclusions. To support readers in evaluating the potential transferability of the findings, the study provided detailed descriptions of the setting, participants, recruitment rationale, and analytic procedures. However, these measures were intended to enhance clarity and contextual understanding rather than to establish generalizability.

Conceptual Framework and Design Boundaries

A second limitation of this study is that a single conceptual framework of SWI guided it. Although this framework provided strong alignment among the problem statement, the research question, and the interpretation of educators' experiences, it also narrowed the study to a single primary explanatory lens. Relying exclusively on SWI limited the opportunity to compare

participants' experiences with other spelling approaches or intervention models. In addition, the study focused on educators' perceptions and experiences rather than directly measuring the effects of SWI on student learning outcomes thereby limiting the strength of its claims about effectiveness. Because this study employed a qualitative design, it cannot support causal inferences about student achievement even though participants reported perceived improvements in spelling and transferred to reading and writing. The distinction is important as perceived instructional effectiveness does not necessarily correspond to measurable achievement outcomes, particularly in diverse student populations and high-stakes educational contexts.

Sampling Approach and Perspective Diversity

A further limitation of this study is related to the use of purposive sampling which constrained the range of perspectives represented in the data. Participants were intentionally selected for their experience implementing SWI which ensured the data would be information-rich and closely aligned with the research question. However, this recruitment strategy likely reduced the inclusion of viewpoints from educators who had attempted SWI but did not continue using it, educators who had never implemented SWI, or educators who held significant reservations about the approach (Campbell et al., 2020). In addition, the sampling strategy limits the extent to which the findings can be generalized to the broader population of K–8 educators in the western United States. Variations in training, school resources, grade levels, and student needs may have led educators across different samples to emphasize different experiences or themes. Accordingly, this study offers a focused account of how SWI was experienced by a particular group of educators rather than a comprehensive representation of all educator

perspectives. Overall, this limitation reinforces the interpretation of the findings as illustrative rather than representative.

Researcher Bias and Social Desirability Bias

An additional limitation of this study is the potential for researcher bias as qualitative data collection and thematic analysis are inherently shaped by the researcher's assumptions, interpretations, and analytic decisions (Baldwin et al., 2022). Although I incorporated strategies such as audit trails, reflexive journaling, and neutral interviewing practices to strengthen trustworthiness, these measures reduce rather than eliminate the possibility of interpretive influence. A related limitation is the potential for social desirability bias as participants may have been inclined to present their instructional practices in a favorable light or to emphasize the successes of SWI while minimizing challenges or difficulties (Bispo Júnior, 2022). While the use of neutral interview prompts and assurances of confidentiality and anonymity helped mitigate this risk, self-report data remain vulnerable to selective recall and impression management. In addition because the study relied primarily on interview data, the findings reflect educators' perceptions and interpretations rather than direct observations of classroom instruction or systematic analyses of student work. As a result, the findings should be understood as representing educators' perceived experiences and meaning making rather than as direct evidence of instructional effects. Overall, these limitations suggest that the study's contribution is best understood as a rich qualitative account of SWI implementation within a specific context.

Recommendations for Future Research

Quantitative and Longitudinal Evidence of Student Outcomes

Future research should examine the effects of SWI on students' spelling, reading, and writing outcomes using designs that allow for stronger conclusions about instructional effectiveness over time. Although participants in this study reported improvements in spelling accuracy and transfer to reading fluency and writing, the current qualitative design did not directly measure student achievement and limit the claims that can be made about effectiveness. To compare SWI with other approaches to spelling instruction, future researchers may consider using quasi-experimental or randomized controlled designs with pretests and posttests, building on the existing intervention literature related to SWI and morphology-informed instruction (Colenbrander et al., 2021; Georgiou et al., 2021). Longitudinal research would also be valuable given that spelling development may vary across grade levels and may require sustained instructional exposure for gains to stabilize across tasks (Gosse et al., 2021; Niolaki et al., 2023). In addition, future studies should investigate whether students with dyslexia or persistent spelling difficulties experience different outcomes from SWI as prior research suggests that spelling interventions may not benefit all learner profiles equally (Galuschka et al., 2020; Mendes & Kirby, 2024). Finally, longitudinal studies that examine transfer effects through authentic writing samples or standardized reading outcomes may provide clearer evidence regarding whether SWI supports literacy development beyond single-word spelling tasks (Graham et al., 2021; McNeill et al., 2023). Overall, these recommendations strengthen the evidence base for SWI by clarifying its instructional impact, its long-term effects, and its potential benefits for diverse groups of learners.

Implementation Studies Across Diverse Contexts and Policy Environments

Future research should examine how contextual factors such as geographic region, school type, and curriculum policy influence the implementation of SWI to understand better the conditions that support or hinder its sustained use. Participants in this study indicated that adequate instructional time, alignment with required programs, and administrative support shaped whether SWI could be implemented with fidelity and suggested that instructional effectiveness may be influenced by system-level conditions rather than classroom practice alone. Studies using survey designs across multiple geographic regions and demographic contexts may improve understanding of transferability and help determine whether similar enabling conditions exist beyond the western United States. Researchers might also investigate how school-level spelling policies and access to instructional resources affect implementation consistency particularly given evidence that spelling instruction can vary substantially when policy guidance is unclear (Esposito et al., 2023). In addition, multi-site qualitative or mixed-methods studies that include classroom observations help distinguish between reported practice and enacted practice while also capturing how educators adapt SWI routines in real time. Because SWI is often described as an inquiry-based approach that reshapes classroom discourse, observation-based research may also provide insight into how educator language and student reasoning develop over the course of the school year (Benedict et al., 2025; Hastings & Trexler, 2021). Overall, this line of inquiry would clarify the role of context in SWI implementation and contribute to a more informed and responsible approach to scaling the model across educational settings.

Professional Development, Teacher Knowledge, and Assessment Development

Future research should examine which forms of PD and coaching most effectively build educators' knowledge of SWI, confidence in implementation, and instructional decision-making.

Participants in this study indicated that SWI implementation was stronger when ongoing learning opportunities and collegial support were available, a finding that aligns with the literature emphasizing the importance of educator knowledge in effective literacy instruction (Benedict et al., 2020; Hudson et al., 2021). Subsequent studies could compare professional learning models such as coaching cycles, lesson study, and research-practice partnerships to determine which approaches most effectively develop educators' linguistic knowledge and classroom practices, particularly in schools characterized by high staff turnover or limited planning time (Tortorelli & Bruner, 2022). Future research should also focus on developing assessment practices more closely aligned with the goals of SWI as participants described relying on a range of informal tools while also expressing constraints with existing progress-monitoring systems. Building on spelling error analysis and the measurement of spelling development, researchers might design and validate assessment tools that capture growth in orthographic reasoning and morphological analysis rather than relying exclusively on conventional spelling tests (Daffern & Fleet, 2021). In addition, studies that examine how assessment data inform instructional adjustments may provide greater insight into how educators use evidence to refine SWI instruction for learners with diverse needs (Niolaki et al., 2023). Overall, this line of research could contribute to stronger practice guidance by identifying professional learning and assessment systems that make SWI instruction more consistent, teachable, and responsive.

Conclusion

The purpose of this qualitative study was to explore educators' experiences implementing SWI for spelling instruction with K–8 students in the western United States. The study was designed to address the following research question: What are educators' experiences with SWI

in addressing spelling underachievement among K–8 students? Participants described SWI as a meaning-first approach that helped students make sense of spelling through consistent instructional routines that integrated morphology, etymology, orthography, and phonology rather than relying solely on memorization. Educators explained that word sums, matrices, and word-family exploration enabled students to justify their spelling choices. This finding aligns with research indicating that morphological knowledge supports growth in spelling and reading. Participants also emphasized that SWI increased student engagement by encouraging sustained discussion of language and positioning students as active investigators, consistent with inquiry-based descriptions of SWI as a literacy-focused instructional framework. In addition, educators reported that spelling knowledge transferred to reading and writing, reinforcing the interconnected nature of spelling, decoding, and written expressions described in the literacy literature. At the same time, participants noted that the benefits of SWI were most fully realized when implementation was supported by adequate instructional time, ongoing professional learning, access to materials, and administrative alignment. Overall, the findings suggest that educators experienced SWI as a meaningful and potentially effective approach to addressing spelling underachievement when it was implemented within a coherent system of instructional and institutional support.

The significance of this study lies in its contribution to understanding how educators experience SWI as a viable approach to addressing persistent spelling underachievement in K–8 settings particularly when traditional instructional methods have not produced satisfactory outcomes. Participants' experiences suggest that SWI may support a more equitable approach to literacy by giving students tools to analyze spelling patterns, reason through challenging words

and persist in the learning process rather than interpreting difficulty as failure. Providing a more equitable approach to literacy is especially important because spelling difficulties can interfere with writing development and broader literacy achievement meaning that improvements in spelling instruction may have benefits beyond spelling alone. The findings also indicate that improved spelling outcomes depend not only on the selection of an instructional approach but also on the conditions that enable educators to implement that approach consistently and effectively. From a practical perspective, these results suggest that schools and districts should consider how scheduling, curriculum expectations, professional learning, and progress-monitoring systems either support or constrain the use of SWI routines particularly for students receiving additional literacy intervention. Although the qualitative and region-specific design of the study limits transferability, the findings provide a meaningful foundation for future research that can integrate educators' experiences with direct evidence of student outcomes across diverse contexts. Overall, this study can impact social change by offering an evidence-based rationale for viewing spelling instruction as an inquiry-driven component of literacy education that when implemented within coherent support structures may strengthen students' confidence, performance, and long-term access to academic and professional success.

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Appendix A: Interview Protocol

Introduction

Thank you for agreeing to participate in this interview and for sharing your valuable insights.

Your experiences are crucial in helping us understand the implementation of Structured Word Inquiry (SWI) in K–8 education and its impact on spelling skills. The purpose of this study is to examine educators' experiences with implementing SWI to enhance spelling skills among K–8 students in the western United States.

Before we begin, please note the following:

- Your participation is completely voluntary, and you may withdraw from the study at any time without any consequences.
- All information you provide will be kept confidential and used strictly for academic research purposes.
- No identifying information will be recorded, ensuring your anonymity.
- The interview will take approximately 45-60 minutes and will be audio-recorded for accurate transcription and analysis.
- You may decline to answer any question that you are uncomfortable with.

Are you ready to begin, or do you have any questions or concerns before we start?

Interview Questions

1. Tell me a little about your teaching background, including how long you have been teaching and your experience with literacy instruction.
2. How did you first learn about Structured Word Inquiry (SWI), and what drew you to implement it in your classroom?

3. Describe the specific grade levels and student populations you work with when using SWI?
4. How do you typically introduce and incorporate SWI into your daily or weekly literacy instruction?
5. What challenges, if any, have you encountered when implementing SWI with your students?
6. In what ways do you believe SWI has influenced your students' spelling abilities and overall literacy development?
7. Have you noticed differences in student engagement or motivation when using SWI compared to other spelling instruction methods? If so, can you provide an example?
8. How do you assess student progress and effectiveness when using SWI in your classroom?
9. What types of support or professional development have you received to aid in the implementation of SWI? What additional support do you think would be beneficial?
10. How do parents and school administrators perceive SWI? Have you encountered any resistance or strong support from these stakeholders?
11. Based on your experiences, what recommendations would you make to other educators who are considering implementing SWI in their classrooms?
12. Have you observed any student demographics or learning profiles that seem to benefit more from SWI compared to traditional spelling instruction methods?
13. What adaptations or modifications have you made to SWI to better fit the needs of your students or classroom environment?

14. How has your understanding of spelling and literacy instruction evolved since implementing SWI in your teaching practices?
15. Is there anything else you would like to add about your experience with SWI that we haven't covered in this interview?

Closing Remarks

Thank you very much for your time and for sharing your experiences with me today. Your insights are invaluable in helping us understand how SWI is being implemented and how it can be improved to support student learning. If you have any additional thoughts after this interview, please feel free to reach out. Your responses will contribute to a better understanding of literacy instruction strategies and their effectiveness.

Wishing you continued success in your teaching and thank you again for your participation.

Appendix B: Codebook

Name	Description	References
Adapting tools and routines to context	Theme: Adapting tools and routines to context	12
Attention and pacing adjustments	Subtheme: Attention and pacing adjustments	1
Cutting steps	Teacher trims steps as needed to maintain engagement.	1
Choice of SWI tools	Subtheme: Choice of SWI tools	1
Prefer sums over matrices	Instructor intentionally selects tools that fit learners and tasks.	1
Concrete routines and manipulatives	Subtheme: Concrete routines and manipulatives	1
Word bag 'stick', foils, homophone book	Launches SWI with Rebecca Loveless' word bag and homophone notebooks.	1
Game-like reconstruction	Subtheme: Game-like reconstruction	1
Turns routines into games	Turns routines into games to sustain attention and practice.	1
Group vs 1 on 1 differences	Subtheme: Group vs 1:1 differences	1
One-on-one flexibility	Tutoring allows opportunistic SWI use without time pressure.	1
Keep etymology at appropriate depth	Subtheme: Keep etymology at appropriate depth	1
Prioritize word sums and present-day structure	Prioritizes word sums and present-day structure for struggling learners.	1
Manipulatives and handwriting scaffolds	Subtheme: Manipulatives and handwriting scaffolds	1
Index cards, Unifix, script paper	index cards; Unifix; script paper. Creates tangible supports for dysgraphia and word building.	1
More GPC focus for emergent readers	Subtheme: More GPC focus for emergent readers	1
Explicit GPC alongside SWI	Provides more targeted GPC practice for emergent learners.	1
Routines that scaffold inquiry	Subtheme: Routines that scaffold inquiry	1
The four questions	Students internalize a consistent set of inquiry questions about words.	1
Student-chosen words and families	Subtheme: Student-chosen words and families	1
Anchoring inquiry	Anchors inquiry in high-interest texts and word families.	1

Name	Description	References
Suffixing flowchart routine	Subtheme: Suffixing flowchart routine	1
Use classroom flowchart	Uses a classroom flowchart to guide suffixing decisions.	1
Visual tools for structure	Subtheme: Visual tools for structure	1
Morphological spelling machine	Morphological spelling machine; Uses a teacher-created 'spelling machine' visual to scaffold analysis and suffixing.	1
Applying SWI across content areas	Theme: Applying SWI across content areas	10
Clarifying the spoken vs written systems	Subtheme: Clarifying the spoken vs written systems	1
Teaches syllable structure vs morphemes	Teaches syllable structure (spoken) vs morphemes (written) and how they may not align.	1
Content integration	Subtheme: Content integration	1
Cryptography class on letters, graphemes, morphemes	Connects SWI to cryptography and disciplinary literacy.	1
Cross-disciplinary use	Subtheme: Cross-disciplinary use	1
Geometry etymology; number words	Extends SWI into math and science discussions.	1
Cross-linguistic connections	Subtheme: Cross-linguistic connections	1
Spanish, English cognates and spellings	Spanish/English cognates and spellings: Learners compare cognates and orthographies to solidify structure over sound.	1
Gifted and dyslexic profiles	Subtheme: Gifted and dyslexic profiles	1
Gifted gravitate; dyslexic plateaus addressed	Notes strong fit for gifted learners and fill-in for dyslexic plateaus.	1
Mathematics and science vocabulary	Subtheme: Mathematics and science vocabulary	3
Acetabulum 'cup for vinegar'	Etymology deepens understanding of anatomy terminology.	1
Morphology clarifies math word problems	Morphology clarifies math word problems and boosts confidence.	1
Paragraph, 'graph'	Paragraph, 'graph'. Word inquiry ties into writing instruction and content themes.	1
Morning messages and content ties	Subtheme: Morning messages and content ties	1
Weaves SWI into daily messages	Weaves SWI into daily messages and content-area vocabulary.	1

Name	Description	References
Phonology within SWI routines	Subtheme: Phonology within SWI routines	1
Grapheme-phoneme mapping	Emphasizes grapheme-phoneme mapping after structural analysis.	1
Building meaning-based spelling knowledge	Theme: Building meaning-based spelling knowledge	12
Connecting word families to consistency	Subtheme: Connecting word families to consistency	3
Paragraph 'graph' base	Paragraph 'graph' base: Students explore a thematic word to surface a free base that recurs across words.	1
Sign, signal (G anchor)	Sign, signal (G anchor): Family members justify grapheme presence across derivatives.	1
Two, twin, twenty	two/twin/twenty; Parents and students are shown families that share meaning to disambiguate homophones.	1
Emphasizing structure and families	Subtheme: Emphasizing structure and families	1
Words have a structure	States that English spelling is principled and analyzable.	1
Etymological markers	Subtheme: Etymological markers	1
Greek, French CH	Uses etymological cues (e.g., CH) to explain grapheme values.	1
Explaining spellings through morphology & etymology	Subtheme: Explaining spellings through morphology & etymology	1
There's always a reason	Teacher stance that spellings are principled and explainable.	1
Function vs lexical explanations	Subtheme: Function vs lexical explanations	1
Exceptions resolved via function words	Uses function/lexical distinction to replace rule-and-exceptions teaching.	1
Normalizing complexity and curiosity	Subtheme: Normalizing complexity and curiosity	1
Reframes complexity and reduces shame	Reframes complexity and reduces shame by inviting curiosity.	1
Orthography as cohesive system	Subtheme: Orthography as cohesive system	1
Positions SWI as best approach for spelling.	Positions SWI as the only approach that makes cohesive sense for spelling.	1
Three-part orthography lens	Subtheme: Three-part orthography lens	1
Morphology, etymology, phonology	Frames English spelling via the interrelationship of morphology, etymology, and phonology.	1

Name	Description	References
Using relatives to resolve schwa, pronunciation	Subtheme: Using relatives to resolve schwa/pronunciation	2
Disease, dis + ease	Morphological analysis (prefix + base) helps unlock spelling of a tricky word.	1
Human, humanity to decide schwa	Teacher uses a meaning-related word to determine an unstressed vowel spelling.	1
Communicating with parents and administrators	Theme: Communicating with parents and administrators	11
Administrator gatekeeping	Subtheme: Administrator gatekeeping	1
Denial of classroom access by new admin	Denial of classroom access by a new administrator unfamiliar with SWI.	1
Administrator support and constraints	Subtheme: Administrator support and constraints	1
Supportive admin, limited spread	Leadership is supportive but has not expanded training sitewide.	1
Defending SWI to parents	Subtheme: Defending SWI to parents	1
Pre-written explanations	Provides concise, reusable explanations to build parent understanding.	1
Inviting parents into lessons	Subtheme: Inviting parents into lessons	1
Builds buy-in by including parents	Builds buy-in by including parents in SWI sessions.	1
Parent education and involvement	Subtheme: Parent education and involvement	1
Parents need convincing, hands-off	Notes need for parent education and varying involvement levels.	1
Parent explanations and buy-in	Subtheme: Parent explanations and buy-in	2
No resistance when explained	Clear explanations of approach minimize parent concerns.	1
Parent explanations and buy-in	Subtheme: Parent explanations and buy-in	1
Parent initial OG preference; conversion	Subtheme: Parent initial OG preference; conversion	1
Parents shift to SWI	Parents shift to SWI after observing sessions.	1
Parent messaging for buy-in	Subtheme: Parent messaging for buy-in	1
English makes sense	Frames SWI to parents to build confidence and buy-in.	1
Resistance and advocacy	Subtheme: Resistance and advocacy	1
Navigates staff resistance	Navigates staff resistance while advocating for SWI.	1

Name	Description	References
Start side-by-side transition	Subtheme: Start side-by-side transition	1
Layering SWI alongside existing approaches	Advises layering SWI alongside existing approaches during transition.	1
Confronting constraints and implementation barriers	Theme: Confronting constraints and implementation barriers	18
Buy-in and conflicting practices	Subtheme: Buy-in and conflicting practices	1
But my teacher said this	Students juggle contradictory messages from different classrooms.	1
Cognitive load in boxed programs	Subtheme: Cognitive load in boxed programs	1
Big wall between levels	Notes a spike in cognitive load and arbitrary rules in OG program progression.	1
Fewer barriers in 1 to 1 context	Subtheme: Fewer barriers in 1:1 context	1
One-on-one tutoring	One-on-one tutoring affords flexible, opportunistic use of SWI.	1
Getting started and knowledge gaps	Subtheme: Getting started and knowledge gaps	1
Really challenging to get started	Notes early uncertainty about leveraging SWI elements effectively.	1
Lack of ready-made materials, time cost	Subtheme: Lack of ready-made materials; time cost	1
Highlighting time burden	Highlights time burden due to gaps in SWI-aligned materials.	1
Learning curve and teacher humbling	Subtheme: Learning curve and teacher humbling	2
Say I don't know	Teacher normalizes uncertainty and models inquiry stance.	1
Steep learning curve	Recognizing that deep word knowledge takes sustained study.	1
Misalignment with other teachers	Subtheme: Misalignment with other teachers	1
Lack of teacher engagement with shared SWI summaries.	Describes lack of teacher engagement with shared SWI summaries.	1
Onboarding and turnover challenges	Subtheme: Onboarding and turnover challenges	1
Momentum hard as team changes	Team changes slow SWI momentum and confidence.	1

Name	Description	References
Program and colleague pushback	Subtheme: Program and colleague pushback	1
Push back from teachers	Meets resistance from staff who want traditional methods used.	1
Program, curriculum alignment needs	Subtheme: Program/curriculum alignment needs	1
SWI friendly curriculum	Desire for resources that align with district expectations without diluting inquiry.	1
Student-driven inquiry is limited	Subtheme: Student-driven inquiry is limited	1
Students not initiating word investigations.	Finds students less likely to initiate word investigations.	1
Teacher comfort and next steps	Subtheme: Teacher comfort and next steps	1
Identifies teacher confidence	Identifies teacher confidence in deciding 'what's next' as a challenge.	1
Teacher fear and time	Subtheme: Teacher fear and time	1
Too nervous to jump in	Too nervous to jump in. Teachers hesitate to start without full knowledge; time is constrained.	1
Time and competing curricula	Subtheme: Time and competing curricula	2
Cut that short	Teacher shortens multi-step routines to meet attention and pacing needs.	1
Nothing except time	Time is the primary resource constraint even when buy-in is high.	1
Unlearning sound-it-out habits	Subtheme: Unlearning sound-it-out habits	1
Older students relearn habits.	Older students must relearn habits built on sounding out.	1
Working alone and limited colleagues	Subtheme: Working alone and limited colleagues	1
Lone ranger	Implementer lacks local colleagues to co-plan and problem-solve.	1
Elevating engagement and ownership	Theme: Elevating engagement and ownership	17
Active manipulation sustains focus	Subtheme: Active manipulation sustains focus	1
Less ADHD stare	Interactive word work keeps attention compared to passive tasks.	1
Aha moments and logic of spelling	Subtheme: Aha moments and logic of spelling	1
Families and learners see logic	Families and learners see logic; lasting improvements in recall.	1

Name	Description	References
Appreciation vs. OG routines	Subtheme: Appreciation vs. OG routines	1
Students prefer interactive SWI	Students prefer interactive SWI over rote OG routines.	1
Authentic production and identity	Subtheme: Authentic production and identity	1
Wrote a play 'spelling scholar'	Co-creates public performances that feature SWI concepts.	1
ELLs and students choose SWI	Subtheme: ELLs and students choose SWI	1
Students prefer SWI	Students, including ELLs, prefer SWI to syllable-type lessons.	1
From avoidance to agency	Subtheme: From avoidance to agency	1
Transformation in reading, writing behaviours.	Reports dramatic transformation in reading/writing behaviors.	1
Game-like, playful routines	Subtheme: Game-like, playful routines	2
Boxes game with explanations	Student-designed rule: earn points only by explaining meaning and spelling.	1
Walk in the woods	Tutor frames base/bound base exploration as a story-based game.	1
Motivating struggling learners	Subtheme: Motivating struggling learners	1
Engagement gains with SWI.	Reports dramatic engagement gains with SWI.	1
Preference for SWI vs traditional tasks	Subtheme: Preference for SWI vs traditional tasks	2
Engagement goes up	Observed increase in participation during SWI compared to program activities.	1
Watch the rabbit hole	Teacher balances enthusiasm with awareness of student overload.	1
Preference over traditional testing	Subtheme: Preference over traditional testing	1
Better student reception	Reports better student reception compared to spelling tests.	1
Replacing tests with inquiry	Subtheme: Replacing tests with inquiry	1
We don't do spelling tests	Drops weekly spelling tests in favor of SWI discourse.	1
Student enthusiasm in tutoring	Subtheme: Student enthusiasm in tutoring	1

Name	Description	References
Most end up enthusiastic	90% end up very enthusiastic. Describes high engagement with SWI over time.	1
Student-initiated inquiry	Subtheme: Student-initiated inquiry	2
Adding to the question wall	Students independently surface words to investigate throughout the day.	1
Ask to do word study	Students prefer SWI work over other adopted tasks.	1
Wonder vs worksheet conditioning	Subtheme: Wonder vs worksheet conditioning	1
Most students' curiosity increases	Most students' curiosity increases; some need time to adapt.	1
Integrating SWI within existing instruction	Theme: Integrating SWI within existing instruction	23
Admin perspective on fit	Subtheme: Admin perspective on fit	1
Grades 3–6 enjoy	Perceives strong fit and routine for grades 3–6.	1
Assessments to guide entry points	Subtheme: Assessments to guide entry points	1
I always do an assessment	Uses baseline assessment (formal/informal) to target instruction.	1
Balancing early phonology and morphology	Theme: Balancing early phonology and morphology	1
Teach both from the start	Pairs phonology work with early morphology exposure in K-2.	1
Choosing tools and artifacts	Subtheme: Choosing tools and artifacts	2
Flow chart for suffixing	Class builds and displays a suffixing flow chart as a shared tool.	1
I do more word sums	Preference for word sums over matrices during instruction.	1
Combining with SPIRE, Wilson	Subtheme: Combining with SPIRE/Wilson	1
Morphology within other programs	Leverages SPIRE/Wilson texts while embedding SWI analysis.	1
Implementing from preschool to adults	Subtheme: Implementing from preschool to adults	1
Applies SWI at preschool age	Applies SWI at preschool age and with adults.	1
Interest-level authentic text	Subtheme: Interest-level authentic text	1
Stop skipping words; annotate	Reads rich texts and pauses to analyze unknown words instead of skipping.	1

Name	Description	References
Launching inquiry with resistant-to-sounding-out words	Subtheme: Launching inquiry with resistant-to-sounding-out words	1
Introducing SWI	Introduces SWI by choosing a word that disrupts sound-it-out habits.	1
Layering SWI with phonics-based programs	Subtheme: Layering SWI with phonics-based programs	1
Layer in SWI on top of Barton	Tutor layers SWI principles alongside a phonics/OG program.	1
Micro-moments and daily word work	Subtheme: Micro-moments and daily word work	1
30-second side journeys	Threads short SWI detours throughout the day alongside scheduled word work.	1
Mix with prior structured literacy experience	Subtheme: Mix with prior structured literacy experience	1
Implemented OG whole class	Draws on OG experience while moving toward SWI.	1
Modifying mandated programs to align with SWI	Subtheme: Modifying mandated programs to align with SWI	1
Identify and remove the worst offenders	Teacher strips out non-SWI practices in required curricula while adding SWI investigations.	1
Notebook-centered routine	Subtheme: Notebook-centered routine	1
Group notebooks as backbone of SWI lessons.	Relies on group notebooks as the backbone of SWI lessons.	1
Protected weekly block	Subtheme: Protected weekly block	1
First 40 minutes dedicated	Schedules routine time for SWI investigations within block scheduling.	1
Start with high-leverage 'sight' words	Subtheme: Start with high-leverage 'sight' words	1
Begins with high-frequency words	Begins with high-frequency words that reveal structure.	1
SWI as the literacy block	Subtheme: SWI as the literacy block	1
Implements SWI as the core of spelling	Implements SWI as the core of reading and spelling instruction.	1
Using live etymology tools	Subtheme: Using live etymology tools	1
Open Etymonline in class	Models inquiry by looking up etymology during lessons.	1
Using SWI for high-frequency words	Subtheme: Using SWI for high-frequency words	1

Name	Description	References
High-frequency sight words	Begins SWI by analyzing high-frequency 'sight' words.	1
Weaving SWI into adopted curricula	Subtheme: Weaving SWI into adopted curricula	2
Rewards lends itself	Existing decoding program (REWARDS) provides entry points for morphology.	1
Weaving it in	Educator integrates SWI elements alongside a mandated program.	1
Weaving with phonics approaches	Subtheme: Weaving with phonics approaches	1
Increased phonics alongside SWI	Combines phonics approaches with SWI more than in prior years.	1
Whole-class family to matrix progression	Subtheme: Whole-class family to matrix progression	1
Convert family to matrix	Moves from shared word family brainstorm to matrices and word sums.	1
Navigating assessment and evidence of impact	Theme: Navigating assessment and evidence of impact	22
Assessment misalignment	Subtheme: Assessment misalignment	1
Mismatch between standard tests and SWI.	Notes mismatch between standard tests and SWI.	1
Complex text advantage	Subtheme: Complex text advantage	1
Students read more accurately	Finds some students read more accurately as text complexity increases.	1
Editing after drafting; non-automaticity	Subtheme: Editing after drafting; non-automaticity	1
Learners analyze and correct spelling post-hoc	Learners can analyze and correct spelling post-hoc even if real-time spelling is hard.	1
Enabling complex vocabulary	Subtheme: Enabling complex vocabulary	1
Spell check can recognize it	Teaches analysis so students can write sophisticated words.	1
Lack of formal assessment	Subtheme: Lack of formal assessment	1
Ultimately unsure	Ultimately unsure; no formal assessment. Expresses uncertainty about impact due to lack of formal SWI measure.	1
Lack of progress-monitoring tools	Subtheme: Lack of progress-monitoring tools	1
Lack of robust spelling progress monitors.	Notes absence of robust spelling progress monitors.	1
Limited formal metrics	Subtheme: Limited formal metrics	1

Name	Description	References
Lack of a dedicated SWI assessment system	Implementer acknowledges lack of a dedicated SWI assessment system.	1
Limited formal metrics and transfer	Subtheme: Limited formal metrics and transfer	1
No formal assessment; limited transfer	Lacks a formal SWI assessment and sees limited transfer of some conventions.	1
Limited transfer to writing conventions	Subtheme: Limited transfer to writing conventions	1
Difficulty transferring suffixing conventions	Notes difficulty transferring suffixing conventions into independent writing.	1
Morphology-inclusive inventories	Subtheme: Morphology-inclusive inventories	1
Modified inventories and HFW dictations	Assesses with morphology-aware spelling inventories and conceptual checks.	1
Multi-method measures	Subtheme: Multi-method measures	1
Uses reading passages, HFW spreadsheets	Uses reading passages, HFW spreadsheets, dictation CWS, and writing rubrics.	1
Not a magic bullet for dyslexia	Subtheme: Not a magic bullet for dyslexia	1
Not a magic bullet	Emphasizes that spelling remains hard for dyslexic students; SWI reduces frustration and provides strategies.	1
Observational and portfolio approaches	Subtheme: Observational and portfolio approaches	2
Binders as evidence	Artifacts (lists of bases/affixes, matrices, concepts) document growth.	1
Spelling checks 3x per year	Periodic formal checks complement daily anecdotal data.	1
Observed outcomes in spelling and reading	Subtheme: Observed outcomes in spelling and reading	2
Reading less robotic; comprehension up	Reader fluency and understanding improve as morphology takes hold.	1
See it first in spelling	Teacher notices immediate spelling gains with reading gains following later.	1
ORF mismatch with learning	Subtheme: ORF mismatch with learning	1
Oral reading fluency as poor proxy for orthographic learning.	Sees oral reading fluency as a poor proxy for orthographic learning.	1
Reading gains before spelling	Subtheme: Reading gains before spelling	1
Start reading better	Reports reading fluency/comprehension improvements as morphology knowledge builds.	1

Name	Description	References
Strategic prompts during testing	Subtheme: Strategic prompts during testing	1
Use SWI prompts to support spelling decisions.	Uses SWI prompts to support independent spelling decisions.	1
Suffixing challenges	Subtheme: Suffixing challenges	1
Doubling is the last to come	Highlights difficulty of stress-dependent doubling convention.	1
Two-layer leap in reading	Subtheme: Two-layer leap in reading	1
Leap is farther	Observes larger gains when phonology and morphology develop together.	1
Using program-based measures	Subtheme: Using program-based measures	1
Barton levels as measure	Progress checked via mastery of levels in a parallel program.	1
Seeking professional learning and community	Subtheme: Seeking professional learning and community	14
Bite-sized educator resources	Subtheme: Bite-sized educator resources	1
Requests concise, grade-banded SWI 'gems'	Requests concise, grade-banded SWI 'gems' and teacher guides.	1
Courses, communities, courage	Subtheme: Courses, communities, courage	1
Encourages teachers to study	Encourages teachers to study, join communities, and start teaching SWI.	1
District, administrative support	Subtheme: District/administrative support	2
Administrator on board	Site leader supports SWI though wider training is limited.	1
Leadership familiarity	Leaders with early literacy background recognize SWI's fit.	1
Fellowship-style mentorship need	Subtheme: Fellowship-style mentorship need	1
Fellowship mentorship	Calls for supervised practice and feedback pathways for SWI implementers.	1
Mentoring and study buddies	Subtheme: Mentoring and study buddies	1
Study buddy	Peer partnership sustains practice and accelerates learning.	1
Ongoing study groups and workshops	Subtheme: Ongoing study groups and workshops	1
Constant, ongoing	Engages in continuous professional learning and community study.	1

Name	Description	References
Peer study for problem-solving	Subtheme: Peer study for problem-solving	1
Relies on ongoing peer study	Relies on ongoing peer study to analyze words and plan instruction.	1
Real Script and motor memory	Subtheme: Real Script and motor memory	1
Uses Real Script	Uses Real Script; views handwriting as engine of spelling and reading.	1
Self-study and online communities	Subtheme: Self-study and online communities	1
Monday workshops and films	Ongoing self-study via workshops and Real Spelling films.	1
Teacher training and book study	Subtheme: Teacher training and book study	1
Facilitates local study groups	Facilitates local study groups to build teacher knowledge.	1
Wide-ranging PD and collegial networks	Subtheme: Wide-ranging PD and collegial networks	1
Sustains practice via multiple trainings	Sustains practice via multiple trainings and ongoing grammar study.	1
Workshops and institutes	Subtheme: Workshops and institutes	2
Professional learning	Professional learning is a common on-ramp to SWI practice.	1
SWI Summer Institute	Formal training (e.g., Summer Institute) builds shared vocabulary and routines.	1
Shifting from phonics, OG to SWI	Theme: Shifting from phonics/OG to SWI	11
Avoiding simultaneous use	Subtheme: Avoiding simultaneous use	1
Keeps OG and SWI separate	Keeps OG and SWI separate to reduce confusion.	1
Changing teacher language and beliefs	Subtheme: Changing teacher language and beliefs	2
Discarding deficit framings and memorization talk	Teacher discards deficit framings and memorization talk.	1
Grief and anger not being taught	Personal identity shift after discovering morphology-centered explanations.	1
Combining until ready to let go	Subtheme: Combining until ready to let go	1
Bridge from OG to SWI	Bridge from OG to SWI by layering before fully transitioning.	1

Name	Description	References
Integrating phonology within SWI	Subtheme: Integrating phonology within SWI	1
Not separate from phonics	Argues that explicit GPC work coexists within SWI investigations.	1
Letting go of syllable types & memorization	Subtheme: Letting go of syllable types & memorization	1
Rejects syllable-type framework in favor of linguistic syllables.	Subtheme: Rejects syllable-type framework in favor of linguistic syllables.	1
Matrix as missing link	Subtheme: Matrix as missing link	1
Sign matrix	Matrix for <sign> reveals meaningful structure beyond syllable types.	1
Motivation to leave OG	Subtheme: Motivation to leave OG	1
OG was boring	Disengagement with OG contributes to adopting SWI.	1
Moving away from syllable division	Subtheme: Moving away from syllable division	1
Practitioner abandoning syllable-division routines	Practitioner abandons syllable-division routines after evidence conflicts.	1
Rejecting leveled readers	Subtheme: Rejecting leveled readers	1
Rejects leveled readers	Rejects leveled readers in favor of authentic text and cohesive orthography.	1
Rethinking reading levels	Subtheme: Rethinking reading levels	1
Moves away from leveled-reader mindset	Moves away from leveled-reader mindset toward authentic texts.	1