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# Third-Grade Teachers' Perceptions of Balanced Literacy

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# Walden University

COLLEGE OF EDUCATION

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Kimberly Harrison

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2017

Abstract

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MA, Columbia College, 2007

BA, Columbia College, 2003

Project Study Submitted in Partial Fulfillment

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Abstract

In response to fourth grade students' performance on the National Assessment of Education Progress reading test, states across the nation have enacted laws which stipulate third-grade students achieve reading proficiency in order to be promoted. With the passage of the South Carolina Read to Succeed Act 2014, school leaders in an urban school district implemented a balanced literacy framework to address 3rd grade students' low reading achievement. Approached from a constructivist framework, the purpose of this qualitative case study was to present 3rd grade teachers' perceptions of the balanced literacy framework with regard to students' reading achievement. Vygotsky's theories of zone of proximal development and scaffolding served as the framework guiding the study. For this study, 5 3rd-grade teachers from elementary schools within the same urban district in South Carolina participated in one-on-one interviews, observations, and a focus group. The data analysis consisted of coding to categorize participants' responses for emerging themes and summarize teacher perceptions. Three major themes emerged: (a) Implementing Balanced Literacy to Promote Reading Achievement, (b) Teachers' Perceptions Affected Reading Outcomes, and (c) Challenges to Balanced Literacy and Professional Development Needs. Subsequently, a 3-day professional development was developed for 3rd-grade teachers that focused on effectively implementing the balanced literacy framework to increase reading achievement. This study can promote social change by increasing teacher expertise in implementing the balanced literacy framework, increasing reading achievement, and positively impacting students' school success and college and career readiness.

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**Introduction**

Becoming a proficient reader is an important milestone in children's development

and proves to be the critical foundation for children's academic success (Hernandez,

2011; Ortlieb, 2013); however, in nearly every classroom, school, and district, teachers

are working with children who struggle with literacy learning. Despite an increased focus

on improving students' reading achievement, students have continued to struggle in the

areas of phonemic awareness, fluency, and comprehension (Begeny, Krouse, Ross, &

Mitchell, 2009; Goffreda, Diperna, & Pedersen, 2009; Samuels, 2002; Shippen, Miller,

Patterson, Houchins, & Darch, 2014). Struggling readers have received interventions in

the form of direct explicit instruction, Response to Intervention, and small group

instruction (Allington, 2011; Burcie & Vlach, 2010; Reutzel, Child, Jones, & Clark,

2014; Rupley, Blair, & Nichols, 2009; Vasquez & Slocum, 2012).

Nevertheless, student achievement scores have not shown significant positive

changes. On the national level, average fourth grade reading scores on the National

Assessment of Educational Progress (NAEP) reading test, with reading scales ranging

from 0 to 500 at all grade levels, have shown some progress, from 212 in 1994 to 221 in

2013 (NAEP, 2014). While South Carolina has experienced some growth in fourth grade

average reading scores as measured by the NAEP's reading test, its scores have remained

below the national average, from 203 in 1994 to 214 in 2013, and South Carolina was

ranked 44 out of 50 (NAEP, 2014). Both neighboring states of South Carolina, North

Carolina and Georgia, had an average fourth grade reading score of 222 in 2013, above

the national average. Educators continuously seek appropriate research-based strategies to meet the needs of students struggling to increase reading performance (Allington, 2011, 2012; Burcie & Vlach, 2010; Cole & Hilliard, 2006; Huang, 2013; Shippen et al., 2014; Slavin, Lake, Chambers, Cheung, & Davis, 2010).

When students continue to read below grade level, they struggle throughout their academic career and are potentially at risk as "drop-outs" (Hernandez, 2011; Shippen et. al, 2014). Additionally, the challenges struggling readers experience, such as decoding, integrating background knowledge with context, and making meaning of text, lead to low economic conditions (Rearden, Valentino, & Shores, 2012). "Individuals with lower reading levels have reduced economic bargaining power, make less money, and have fewer career choices" (Shippen, 2008, p. 345). Literacy is highly correlated to one's educational success and can even be linked to one's social and economic growth (Rearden et al., 2012).

Based on the NAEP 2013 Reading Report for South Carolina, the average score in South Carolina of 214 was lower than the nation's average of 221. In fact, third-graders in a large urban district in central South Carolina scored on average 67% on the 2014 district Reading benchmark assessments. In addition, 77% of the district's third-grade students scored *need support* or *close* for their Reading Readiness level on the ACT Aspire 2015 assessment. In 2014, Governor Nikki Haley unveiled the Read to Succeed Act to provide literacy training for teachers and define interventions to tackle the needs of the state's struggling readers (Bowman, 2014; Petty, 2014). Third-graders would need to pass reading benchmarks, as measured by the state's assessment ACT Aspire, before

being promoted to the fourth grade. Not only has South Carolina responded, but 15 other

states and the District of Columbia have launched similar programs, including in Florida,

Colorado, Mississippi, Ohio, and Arizona (Riccards, 2012). Indeed, the economic

conditions of the United States rely on the literacy skills of its workforce (Rearden et al.,

2012). Just as the nation's struggling students lack the prerequisite skills to succeed with

grade level expectations, they lack the literacy skills to achieve in a global society

(Hernandez, 2011; Rearden et al., 2012).

Research studies have found that many teachers lack knowledge in literacy

development and thus lack the ability to create and grow language and literacy

development (Knight-McKenna, 2009; Menzies, Mahdavi, & Lewis, 2008; Rowland,

2015; Spear-Swerling & Zibulsky, 2013). A significant challenge for teachers with

struggling readers is the limited training to provide explicit instruction and appropriate

interventions (Shippen et al., 2014). Teaching the reading process and building readers

are complex tasks. With experience and knowledge of research-based, effective

instructional practices, teachers become more skilled in providing reading instruction and

knowing how to apply the most appropriate strategy (Menzies et al., 2008). Therefore, an

essential step in improving students' reading achievement is to increase educators'

awareness and use of research-based practices (Knight-McKenna, 2009; Lipson &

Wixson, 2010; Menzies et al., 2008).

Identifying struggling readers and providing them with research-based

instructional practices will result in more students graduating from high school with

strengthened literacy skills (Balfanz, Herzog, & Mac Iver, 2007; Goffreda et al., 2009;

Hernandez, 2011; Ortlieb, 2013; Roskos & Neuman, 2013). As of 2015, South Carolina had a high school graduation rate of 78%, but this could be increased to the national average of 90% (Strauss, 2015). There has been a consensus from the research that struggling readers need effective instruction and appropriate interventions (Begeny & Silber, 2006; Joseph & Eveleigh, 2011; Lee & Schmitt, 2014; Lipson & Wixson, 2010; Marzano, 2007; Samuels, 2002; Shippen, 2008; Vasquez & Slocum, 2012). An effective instructional framework that includes purposeful practices and appropriate interventions must be introduced in elementary school to alleviate these reading difficulties (Fountas & Pinnell, 2002; Lee & Schmitt, 2014). Interventions targeted at improving phonemic awareness, fluency, and comprehension are pivotal to improved reading achievement and are at the core of the balanced literacy framework (Joseph & Eveleigh, 2011; Marshall, 2015; National Institute of Child Health and Human Development, 2013; Shippen et al., 2014). In this study, third-grade teachers presented their perceptions of the balanced literacy framework, the pros and cons of this approach, and additional support needed to better support students through the balanced literacy framework.

## Definition of the Problem

During the last few decades, educators have tried innovative strategies to raise the performance of struggling readers including core reading programs, paraprofessionals, Reading Recovery, Response to Intervention, and small group instruction (Allington, 2011; D'Ardenne et al., 2013; Fiore & Roman, 2010; Gibson, 2010; Knight-McKenna, 2009; Lipson & Wixson, 2010; Vasquez & Slocum, 2012; Zvoch & Stevens, 2011). The National Reading Panel (2000) published a seminal report, *Preventing Reading*

*Difficulties in Young Children*, which provided research-based recommendations on what could be done to better position students in prekindergarten through Grade 3 for success in Grade 4 and above. These recommendations included explicit instruction, continuous assessment of word recognition accuracy and reading fluency, direct instruction on comprehension strategies, and daily independent reading (Samuels, 2002; Snow, Burns, & Griffin, 1998). Despite the efforts of researchers and the recommendation presented in the report, there has been no evidence of the implementation or effectiveness of recommendations, as average reading scores have virtually remained stationary across the nation (Annie E. Casey Foundation, 2014). Alarmingly, after over a decade of No Child Left Behind implementation, the majority (66%) of third-graders across the nation read at levels below proficiency as measured by the states' assessments (O'Keefe, 2012; Annie E. Casey Foundation, 2014). The problem this study addressed is third-grade students in a South Carolina school district who are struggling to read and comprehend grade level text and are not demonstrating reading proficiency.

Reading proficiently is an essential life skill that supports academic and lifelong success. When children struggle to read, this creates a multifaceted challenge (Abbott, Wills, Miller, & Kaufman, 2012; Goffreda et al., 2009; Kuhn & Stahl, 2003). These children potentially face academic difficulties, emotional and social stresses, and even school failure or dropout (Hernandez, 2011; Shippen, 2008). School leaders within an urban school district in South Carolina recognized the potential risks that could threaten their population. The district's decision makers, including school board members, teachers, curriculum specialists, and school administrators, restructured the elementary

level language arts curriculum to adopt a balanced literacy instructional framework, according to school documents. Due to the urgency of third-grade students' level of reading performance, third-grade teachers are expected to implement the district's reading model with fidelity.

At the same time, district leaders became aware of other indicators of a need for change in reading instruction in order to increase reading achievement. Educators across the district were utilizing varied instructional programs and practices, including Reading First, Reading Recovery, and Four Blocks. Unfortunately, none of the programs provided consistent improvements with students' reading achievement. In addition, there was a large percentage (42%) of students not meeting reading proficiency when scores were reported from the state's new assessment, ACT Aspire, in 2015 (South Carolina Department of Education, 2015). In this school district, third-grade students' scores were below the ACT Aspire reading readiness benchmark score of 415 and approximately 6 points lower than scores in bordering counties. Lastly, of the 28 elementary schools in the district, seven of the schools failed to make adequate yearly progress, or AYP, due to students' low performance on the state's reading test (South Carolina Department of Education, 2015). Of the remaining 21 schools, eight of the elementary schools were categorized as "At Risk" for growth rating and experienced a decrease in students' scores on the state's reading assessment. For these reasons, the district addressed the problem of low reading performance among its students by implementing a balanced literacy framework for reading instruction.

Research has substantiated the idea that struggling readers need immediate and effective interventions to increase reading proficiency (Begeny & Silber, 2006; Burcie & Vlach, 2010; Coyne et al., 2009; Duke & Pearson, 2001; Kuhn, 2005; Kuhn & Stahl, 2003; Samuels, 2002; Vasquez & Slocum, 2012; Wood, Harmon, & Taylor, 2011). A challenge can be determining the most effective program. In order to accurately measure the effectiveness, an instructional program or model must be implemented through on-going training and resources (Coyne et al., 2009). Without the appropriate interventions, students may continue to struggle throughout their education and potentially have fewer career choices (Duke & Pearson, 2001; Ortlieb, 2013; Shippen, 2008). Researchers' reports have highlighted the crisis regarding reading achievement in the United States.

According to the 2015 NAEP reading assessment, 33% of fourth-graders in the United States read below the basic level and in South Carolina, and 35% of fourth-graders read below the basic level. The assessment required fourth-grade students to demonstrate reading proficiency with both literary and informational text. Beginning in first and second grade, an effective instructional model needs to be in place that efficiently equips students with reliable reading strategies to be a proficient reader (Boulware–Gooden, Carreker, Thornhill, & Joshi, 2007; Duke & Block, 2012; Elvin, 2011; Reynolds, Wheldall, & Madelaine, 2011; Riccards, 2012). Research has shown that effective interventions can support high and low-achieving readers to increase word recognition, oral reading fluency, and reading comprehension (Gibson, 2010; Guthrie et al., 2009; Kuhn, 2005; Marzano, 2007; Menzies et al., 2008; Samuels, 2002).

In a study to analyze problems with America's educational system, Boyer and Hamil (2008) reported a reading deficiency epidemic in public schools in the United States. In the study, researchers found that over 8 million American students in – kindergarten through Grade 12 struggled with reading proficiency and comprehension even at the basic level (Boyer & Hamil, 2008). Challenges learning how to read at lower grades, left unresolved, can lead to challenges reading to learn in latter grades. Ultimately, these reading challenges become a threat to a child's entire education (Abbott et al., 2012; Ortlieb, 2013; Podhajski, Mather, Nathan, & Sammons, 2009). A report published by Renaissance Learning (2015) found that American high school students were reading at an average of a fifth grade reading level and fewer than 15% of high school students were reading books within their target grade band. This epidemic of low reading comprehension highlights the need for an effective research-based instructional model that provides explicit instruction, purposeful learning experiences, and targeted instructional support to build students' reading proficiency.

Significantly, educators varied greatly on selecting and implementing an instructional model that adequately engages, challenges, and motivates children to excel academically (Watkins & Kritsonis, 2011). Educators employed a wide variety of models to increase reading abilities, but selecting an effective reading instructional model was inconsistent (Nathan, 2010; Watkins & Kritsonis, 2011). More research and data revealed that students in the United States experienced the challenges of reading and comprehending grade level text, applying reading strategies, and making meaning of a variety of text types (Nathan, 2010). This evidence substantiates the need for a balanced

literacy instructional framework that includes best practices for increasing student reading achievement.

Lastly, a major flaw with reading instruction is the framework through which reading instruction is delivered (Knight-McKenna, 2009; Wolf, n.d). An instructional model aimed at improving phonemic awareness, fluency, and comprehension is vital to improving student reading achievement (National Institute of Child Health and Human Development, 2013). Researchers have found balanced literacy to be an effective framework in responding to students' needs and leading to high academic achievement (Shaw & Hurst, 2012). In previous studies, the application of a balanced literacy framework led to gains in students' strategy knowledge and increased performance in literacy on standardized assessments (Frey Lee, Tollefson, Pass, & Massengill, 2005; Kennedy & Shiel, 2010). A balanced literacy instructional framework supports the development of learning experiences that allow teachers to model, to remediate, and to support students in applying reading skills and strategies (Briggs & Anderson, 2011; Frey et al, 2005; Kennedy & Shiel, 2010).

The school district in this study modified its reading curriculum to implement a 2-hour balanced literacy instructional framework that all kindergarten through fifth grade teachers would be required to use. Third-grade students' continued low performance on the state's reading test and the passage of the Read to Succeed Act motivated the district to restructure its K through 5 reading instructional model. In 2013, 29.4% of the district's third-graders did not meet state reading proficiency levels. The percentage of students not meeting state's reading proficiency increased to 33% in 2014 (South Carolina

Department of Education, 2015). When the results from the state's new assessment, ACT

Aspire, were released, 77.5% of the district's third-grade students were indicated to not

be ready for fourth grade (South Carolina Department of Education, 2015). As a part of

the implementation process, this school district followed the process of (a) developing

exemplary units of study that were aligned to the balanced literacy framework, (b)

providing professional development for all K through 5 reading teachers, and (c)

purchasing instructional and professional resources for each component of the balanced

literacy framework. In this case study, I examined teachers' perceptions of balanced

literacy, the pros and cons of this approach, and additional supports needed to better

support students through the balanced literacy framework.

Balanced literacy, an instructional framework for reading, emphasizes the

essential components of reading through explicit instruction of phonics, phonemic

awareness, fluency, vocabulary, and comprehension (Fountas & Pinnell, 1996). Balanced

literacy is a comprehensive research-based and assessment-based approach to reading

instruction. It involves the teacher making deliberate choices about the best way to

improve students' reading and writing (Mermelstein, 2013). Balanced literacy supports

teachers in meeting students at "their instructional and developmental levels … [for] the

purpose of learning to read for meaning, understanding, and joy" (Cowen, 2003, p. 10).

**Rationale**

The local school district in the study adopted balanced literacy as its instructional

framework for reading instruction. Third-grade students had been struggling to meet

reading proficiency levels, and the Read to Succeed Act 2014 mandated a third-grade

promotion policy. The district needed an effective, research-based strategy to address the reading difficulties evident across the district. Prior to this project study, there had been no study conducted to determine teachers' perceptions of the local district's mandated balanced literacy instructional framework. Research was merited to study the teachers' perceptions of a balanced literacy framework. Previous research studies revealed that perceptions of balanced literacy caused teachers to struggle in properly implementing balanced literacy (Bitter, O'Day, Gubbins, & Socias, 2009; O'Day, 2009). Teachers perceptions of the district's balanced literacy framework influences the implementation and could alter the results on increasing reading achievement. The case study presented the opportunity to examine the perceptions of teachers who were implementing a balanced literacy framework as a tool for increasing student reading achievement. From a broader perspective, I was attempting with this study to provide a detailed description of teachers' perceptions of balanced literacy, the pros and cons of this approach, and additional support needed to better support students through the balanced literacy framework.

**Evidence of the Problem at the Local Level**

Although the national report *Preventing Reading Difficulties in Young Children* (Snow et al., 1998) was published over 15 years ago and outlined research-based practices to build reading fluency, national reading scores among fourth graders have not changed significantly over the past 10 years (Duke & Block, 2010; NAEP, 2014; Wolf, n.d). Even worse, the nation's high school students are reading on a fifth grade average reading level, and according to the NAEP, reading scores among high school students

have not increased significantly in the past 30 years (Snow et al, 1998). Likewise, the average reading scores among fourth graders in South Carolina have remained virtually stagnant and as of 2014 were lower than the national average for public schools (NAEP, 2014). Whereas the national fourth grade average reading score was 220.7, South Carolina fell slightly behind at 213.6 on the NAEP's 2013 reading test (NAEP, 2014). In the state of South Carolina, the greatest percentage of students were performing *below basic* in reading achievement (NAEP, 2015).

South Carolina's Palmetto Assessment of State Standards (PASS) English/Language Arts test scores for third-grade students in the school district steadily declined, as indicated in Table 1, during the time period from 2011 to 2013. Table 1 presents data displaying the school district's enrollment during the first day of testing and the percentage of students who scored *met* or *exemplary* (passing) for a period of 3 years. In 2011, 75.2% of the 1,787 third-grade students scored *met* or *exemplary*; for 2012, 74.1% of 1,776 students passed; and in 2013, only 72.8% of 1,811 students passed as shown in Table 1 (South Carolina Department of Education, 2015). Steady declines in South Carolina PASS English/Language Arts scores and consistent performance below the state's average were reasons why the school district implemented a balanced literacy instructional framework.

Table 1

*South Carolina PASS English/Language Arts Met or Exemplary Rates for 3 Years in the Urban School District*

| Grade 3 Test Administration Year | School district enrollment at the starting day of testing | Percentage of students scoring Met or Exemplary |
|---|---|---|
| 2011 | 1,787 | 75.2 |
| 2012 | 1,776 | 74.1 |
| 2013 | 1,836 | 72.8 |

*Note*: South Carolina Department of Education. (2015). Retrieved from South Carolina state report card: http://ed.sc.gov/data/report-cards

Another indication of declining scores was the difference in the percentage of students scoring *met* or *exemplary* in third-grade between the district and state. In 2011, the percentage of students scoring *met* or *exemplary* on the South Carolina PASS English/Language Arts test was 74.7% for the school district and 80% for the state, a difference of 5.3%. In the following year of 2012, the difference was greater as the percentage of third-graders scoring *met* or *exemplary* was 73% for the district and 80.3% for the state, a difference of 7.3%; however, in 2013, the percentage of students scoring *met* or *exemplary* in the district was 78.4% and 82.9% for the state, a smaller difference of 4.5%. The percentage of students who scored *met* or *exemplary* for the district remained substantially lower than the state's average as shown in Table 2. Overall, within the 3 years, the school district's South Carolina PASS English/Language Arts *met* or *exemplary* rates fell below the state's average for third-graders (South Carolina Department of Education, 2015).

Table 2

*Percentage of Third-Grade Students who Scored Met or Exemplary by the School District and the State in South Carolina*

|  | 2011 | 2012 | 2013 |
| --- | --- | --- | --- |
| School district | 74.7 | 73 | 78.4 |
| State | 80 | 80.3 | 82.9 |
| Difference | -5.3 | -7.3 | -4.5 |

As South Carolina prepares for the Read to Succeed Act 2014 to take effect beginning in 2018, initial data have shown that the state could have approximately one third of third-grade students being retained. According to the 2013 NAEP State Report for South Carolina, 40% of fourth graders are performing at a below basic achievement level for reading. In the large, urban school district for this study, 32.5% of students were performing at the below basic level in reading. In an effort to provide support for the population of students performing at below basic, the district identified increasing students' mastery of literacy skills as an objective in the districts' strategic plan because reading achievement has been a common challenge throughout the district. In the three schools selected for this study, the percentage of third-graders scoring *not met* on the 2014 South Carolina PASS English/Language Arts test ranged from 32.2% to 47.8% as shown in Table 3 (South Carolina Department of Education, 2015). Students' state test results indicated that third-grade students failed to meet district and state standards.

Table 3

*South Carolina PASS English/Language Arts Not Met Rates for 2014 in the School District*

| School | Percentage of Students Scoring Not Met |
| --- | --- |
| School A | 47.8 |
| School B | 38.6 |
| School C | 32.2 |

*Note*: South Carolina Department of Education. (2014). Retrieved from South Carolina State Report Card: http://ed.sc.gov/data/report-cards

District leaders were concerned about students' low reading achievement and declining reading performance. There was a need for an effective, research-based instructional strategy that would provide a comprehensive reading foundation. Furthermore, the overall goal of a balanced literacy program is to motivate students to become independent readers while increasing the amount of complex texts read (Meyer & Ray, 2011; O'Day, 2009).

In this qualitative case study, I examined teachers' perceptions of the balanced literacy framework to increase reading achievement and prepare students with the essential literacy skills to be productive citizens in a global society. Moreover, a balanced literacy framework was adopted and implemented by the school district to address the needs of its students not meeting reading performance expectations and to increase reading achievement.

**Evidence of the Problem from the Professional Literature**

When students struggle with reading and are not reading on grade level, the problem plagues not only their reading performance, but extends to multiple content areas (Alderton, 2010; Baker et al., 2011; Morgan, Farkas, & Hibel, 2008; Podhajski et al., 2009). These students usually struggle to grasp concepts and perform lower in science, social studies, and abstract mathematics because they lack the comprehension development that is naturally developed through reading complex texts. There are deficiencies with vocabulary, background knowledge, and understanding the structure of expository text that create challenges (Hall, 2005; Meyer & Ray, 2011). In the primary grades, first and second grades, the reading development is focused on learning how to read and the focus shifts to reading to learn in the upper grades. Challenges learning how to read at lower grades, left unresolved, lead to challenges reading to learn in later grades. The state's expectation of students to be proficient readers by the end of Grade 3 poses great challenges as they progress to secondary levels (Miller, Darch, Flores, Shippen, & Hinton, 2010; Vaughn & Fletcher, 2012). Ultimately, these reading challenges threaten a child's entire education (Abbott et al., 2012; Ortlieb, 2013; Podhajski et al., 2009; Rose & Schumke, 2012).

Researchers have recognized the consequences that plague learners when they are unable to master reading by the end of third-grade. Hernandez (2011) conducted a longitudinal study to calculate high school graduation rates for children at different reading skill levels. The results showed that "nearly 4,000 students …who don't read proficiently by third-grade are four times more likely to leave school without a diploma

than proficient readers" (Hernandez, 2011, p. 3). Unfortunately, when students did not master reading by the end of third-grade, "the rate is nearly six times greater" (Hernandez, 2011, p. 3). The author concluded that a high-quality early education program that provided a pre-K to third-grade integrated approach would be a cost-effective means of improving school success (Board, 2013).

The provision for effective instructional practices for reading instruction is critical. Researchers (Allington, 2011; Menzies et al., 2008; Rupley et al., 2009; Snow et al., 1998) have found that the most effective approaches to supporting reading proficiency are through the use of research-based strategies. Several research-based practices have been outlined in the professional literature to successfully build reading proficiency. Moreover, an effective research-based practice identified by the National Research Council included balanced literacy (Allington, 2011; Mermelstein, 2013; Snow et al., 1998).

In response to the challenges for third-grade students reading at levels below proficiency, educators have been making efforts to identify practices that will stimulate and grow reading achievement among this vast group of students (Lipson & Wixson, 2010; Shippen et al., 2014). The current study involved investigating third-grade teachers' perceptions of balanced literacy, an effective evidence-based reading instructional strategy (Allington, 2011; Bitter et al., 2009; Mermelstein, 2013). This population was selected because of the proficiency expectations and recent guidelines that mandated students be retained at the end of third-grade if not reading proficiently (Bowman, 2014).

**Definitions**

*Balanced literacy framework* is a framework for reading instruction that involves five components: read aloud, shared reading, guided reading, independent reading, and writing (Marshall, 2014).

*Gradual release of responsibility* is a stage in the learning process in which the teacher provides support for students to internalize and master concepts about reading that are too difficult for them to master on their own (Fountas & Pinnell, 1996; Justice & Ezell, 2004).

*Reading achievement* is the level of attainment in any or all reading skills as measured by a reading assessment (Allington, 2014; Kuhn, Schwanenflugal, & Meisinger, 2011).

*Reading proficiency* refers to performance on the NAEP reading assessments. Scale scores range from 0 to 500, with a standard deviation of 100 (Allington, 2014; Kuhn et al., 2011).

*Scaffolding* is the process through which a teacher or more competent peer gives assistance to the student in his/her zone of proximal development as needed, and decreases the support as it less necessary (Balaban, 1995).

*Teacher perceptions* are the beliefs that teachers hold that ultimately influence their teaching style, selected instructional resources, and the structure of their classrooms (Barnyak & Paquette, 2010; Griffith, Massey, & Atkinson, 2013).

*Zone of proximal development* is the difference between what a learner can do without help and what he or she can do with help; "the distance between the actual

developmental level as determined by independent problem solving and the level of

potential development as determined through problem solving under adult guidance, or in

collaboration with more capable peers" (Vygotsky, 1986, p. 86).

## Significance

The problem with reading achievement within American schools is that "a third of

today's fourth graders are unable to read at grade level" (Riccards, 2012, p. 9). Previous

studies have examined the essential steps of teaching the reading process. Although there

has been an evolution in reading instructional practices and strategies, there has remained

a widespread epidemic of struggling readers (Begeny & Martens, 2006; Begeny & Silber,

2006). These struggling readers lack fundamental reading skills, a situation that will limit

their academic achievement. Not only is low reading achievement a significant predictor

of student success in school, but low reading achievement impedes a student's success in

life (Conley & Wise, 2011; Hernandez, 2011; Nathan, 2010). Low reading achievement

affects adulthood by restricting this population to low socioeconomic conditions (Huang,

2013) and limiting the opportunities to contribute to society (Annie E. Casey Foundation,

2010). Evaluating teacher perceptions of the balanced literacy framework, the pros and

cons of this approach, and additional support needed to better support students through

the balanced literacy framework has provided feedback on the district's reading

instructional framework used to increase reading achievement.

The stakeholders within the urban school district want the reading achievement

among third-grade students to improve. With South Carolina's Read to Succeed Act,

students must meet grade level reading proficiencies by the end of third-grade or be

retained for intense reading services. This study could provide vital information to other schools experiencing similar challenges about student reading achievement and seeking effective research-based instructional strategies to enhance student reading proficiency. The 2013 South Carolina PASS English/Language Arts test results indicated that 21.6% of third-graders in the urban school district were performing below grade level expectations in reading. This group could potentially predict the percentage of third-graders retained in 2018; however, if teachers are equipped with and actively using effective practices, the number of students being retained could be significantly decreased (Duke & Block, 2012; International Reading Association, 2002; Rupley et al., 2009; Snow et al., 1998). Previous research has indicated that when teachers are knowledgeable and trained in effective practices, there can be a profound impact on student reading achievement (Begeny & Martens, 2006; Duke & Block, 2012; Masters, Magidin de Kramer, O'Dwyer, Dash, and Russell, 2012; Ross & Lowther, 2009).

## Guiding/Research Question

Many students struggle to attain reading proficiency and often experience difficulties in reading comprehension. The problem that spurred this qualitative case study was that the school district had experienced a steady decline in third-grade students' reading achievement. In response to the continuous decrease in student reading achievement, the district implemented the balanced literacy framework to guide reading instruction and increase reading achievement. In this study, I investigated third-grade teachers' perceptions of the balanced literacy framework, the pros and cons of this approach, and additional support needed to better support students through the balanced

literacy framework. The guiding question was as follows: What are teachers' perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement? The research subquestions are as follows:

1. How do teachers define balanced literacy?

2. How does the balanced literacy framework guide reading instruction?

3. What literacy components and literacy structures do teachers emphasize?

4. Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement?

5. How do teachers perceive balanced literacy to impact student achievement?

## Review of the Literature

In the literature review, I discuss the zone of proximal development, scaffolding instruction, and the balanced literacy framework in promoting reading achievement. School district leaders and curriculum teams representing the district in the study developed a balanced literacy framework to guide the implementation of balanced literacy to support third-grade students' reading achievement. The district's educational leaders, as other school leaders in the United States, are able to empower students to become productive citizens in a changing world through the application of a constructivist balanced literacy approach (Bitter et al., 2009; Kalpana, 2014). Adopting a balanced literacy framework is a widely used approach to provide a balance between comprehension and phonics-based instruction (Uzuner et al., 2011). The explicit and systematic instruction associated with a balanced literacy approach builds students' comprehension while still addressing reading strategies such as decoding. A balanced

literacy approach provides multiple experiences for learners to construct meaning from text with varied levels of support based on learners' needs. Throughout this literature review, I explain how social constructivism applies to this study and analyze the challenge of low reading achievement throughout the broader community that is associated with the local district's third-grade students struggling to reach grade level reading achievement levels.

With this research study, I have used current literature published within the last 5 years, including peer-reviewed articles. The research process began with Walden University's online library and a review of an abundance of article from the educational databases of ERIC, Educational Research Complete, SAGE Premier, as well as Thoreau. In finding articles for the study, the following keywords were used: *balanced literacy, read aloud, word study, guided reading, shared reading, independent reading, social constructivism, Vygotsky, zone of proximal development, scaffolding, reading,* and *reading comprehension*. A review of the current studies revealed that although there have been numerous studies on balanced literacy and its components, many of the studies defined balanced literacy and its components and explained the role of balanced literacy in a primary (kindergarten through second grade) classroom. These current studies showed that limited studies have been completed on teacher perceptions of balanced literacy at the intermediate elementary level.

**Theoretical Framework**

The purpose of this qualitative study was to examine teacher perceptions of a balanced literacy approach, the pros and cons of this approach, and additional support

needed to better support students through the balanced literacy framework. Balanced literacy is a reading program based on the notion that students learn to read at different rates, and it therefore provides varied learning experiences that target the needs of all learners through whole group, small group, and independent activities (Fountas & Pinnell, 1996; International Reading Association. 2002; Maddo, Griffo, Pearson, & Raphael, 2011; Marshall, 2014; Shaw & Hurst, 2014). Balanced literacy recognizes the social components of reading and incorporates opportunities for discussions and social interactions with peers and adults (Fountas & Pinnell, 2002; O'Day, 2009). Social constructivism is a theory that supports the development of literacy skills. The practices of balanced literacy encompass Vygotsky's (1978) social constructivism theory. Vygotsky asserted that students increase their learning success through social interactions and that their social and cultural experiences contribute to their cognitive development. Vygotsky's perspective on learning based on the zone proximal development and the concept of scaffolding are both social interactions supported through the balanced literacy framework (Shaw & Hurst, 2014). Balanced literacy is aligned with the social constructivist philosophy of Vygotsky. The following review on constructivism presents (a) the characteristics of constructivism, (b) Vygotsky's theory of social constructivism, and (c) the connection of social constructivism and balanced literacy.

**Constructivism.** Constructivism, the philosophical framework of how one thinks and learns, is a postmodern theory of learning that "offers an explanation of the nature of knowledge and how humans learn" (Ultanir, 2012, p. 195). Vygotsky (as cited in Liu & Chen, 2010) described it as a lifelong process in which learners construct meaning from

reality. More classrooms are shifting towards constructivist practices and developing a student-centered approach in which students "acquire facts, principles, and theories as conceptual tools for reasoning and problem-solving in meaningful contexts" (Khoja, Sana, Karim, & Ali Rohman, 2009, p. 192). In these classrooms, students take a more active role in the learning process and the interactions between the teacher and student drive the pace of the learning. As a facilitator, the teacher provides information and plans learning experiences that enable students to discover their own meaning (Hartfield, (2010; Jia, 2010; Liu & Chen, 2010). As a result, students are constructing, creating, inventing, and developing knowledge and meaning.

There is no consistently distinctive definition of constructivism, but rather multiple variations (Gash, 2014; Powell & Kalina, 2009). Although there are differing views, two common foundational principles exist among constructivist viewpoints: (a) students help to build their own knowledge and (b) instruction must support students' construction (Gash, 2014; Green & Gredler, 2002). Additionally, there are four key schools of thought on the constructivist classroom: cognitive constructivism, social constructivism, radical constructivism, and holistic constructivism. Jean Piaget was a French psychologist who developed the theory of cognitive development. He presented the idea that thinking evolves from illogical to logical thinking (Gash, 2014; Green & Gredler, 2002; Tobias, 2010). In a cognitive constructivist classroom, students participate in exploratory learning while the teacher facilitates the learning through the use of probing questions (Powell & Kalina, 2009). Vygotsky, a Russian psychologist, was considered the father of social constructivism (Green & Gredler, 2002; Powell & Kalina,

2009). Vygotsky's ideas were similar to Piaget's in that both stressed logical thinking. However, Vygotsky identified specific components that are essential to cognitive development: teacher-student interaction, modeling, and explaining (Green & Gredler, 2002; Powell & Kalina, 2009). From a radical constructivist viewpoint, the classroom environment is a community where everyone has equal importance. Each learner, or member of the community, has a level of expertise and no one is thought of as the expert (Green & Gredler, 2002). Lastly, a holistic approach emphasizes students taking charge of their learning. Holistic constructivists believed that when students exert ownership of their learning, they learn more (Green & Gredler, 2002; Tobias, 2010). Of these constructivists' viewpoints, cognitive and social constructivism are most often evident in the classroom (Jia, 2010; Powell & Kalina, 2009). When implemented appropriately, constructivist instruction can have a positive impact on student achievement. In order for this to occur, teachers should communicate concepts directly and explicitly so that students are able to connect ideas (Powell & Kalina, 2009). The common idea among constructivist theorists is that students' learning and knowledge construction need to be authentic, hands-on, and inquiry based (Ciampa, 2012).

**Social constructivism.** Vygotsky developed his social constructivist theory while in the Soviet Union (Louis, 2009). Culture, language, and social development were the foundation of Vygotsky's (1978) theory. Social constructivism suggested that knowledge is developed as the learner interprets and synthesizes ideas. Vygotsky explained that the process of development is dependent on social interaction, and social learning is what leads to cognitive development. He focused on the connection between people and the

cultural context in which they act and interact in shared experiences (Crawford, 1996).

According to Vygotsky, people use tools that are formed from a culture to moderate their

social environments. Children develop these tools to serve solely as social functions, a

means of communicating needs. Vygotsky believed that the internalization of these tools

led to higher thinking skills. Vygotsky recognized a transition from social speech to

internalized thoughts. Thus, Vygotsky concluded that thought and language could not

exist without each other. Through Vygotsky's social constructivist approach, he asserted

that social development precedes cognitive development (Fox & Riconscente, 2008).

Vygotsky's (1978) theory of social constructivism included three essential

concepts. He believed that the lifelong process of development is dependent on social

interaction, and social learning leads to cognitive development. This concept is referred

to as the zone of proximal development. Vygotsky defined the zone of proximal

development as "the distance between the actual development as determined through

problem-solving and the level of potential development as determined through problem-

solving under adult guidance, or in collaboration with more capable peers" (p. 86). The

zone of proximal development represents the area where tasks are too difficult to be

performed independently but are successfully accomplished with support from an adult or

more capable peer (Louis, 2009; Vygotsky, 1978). The zone of proximal development

bridges the gap between what is known and what can be learned and, according to

Vygotsky, learning takes place in this zone. He argued that cognitive development will

not occur if a task is simple enough to be completed independently or too difficult to be

completed with support. Instruction that is slightly beyond the knowledge base of the

learner and is supported by peers, or the teacher provides appropriate support to maintain

consistent learning without learner frustration (Yan-bin, 2009). Moreover, teachers

should use learners' zone of proximal development to guide instruction and learning

experiences. Vygotsky (as cited in Yan-bin, 2009) argued that learners must be provided

curriculum-based on their instructional level in order for their zone of proximal

development to grow.

Additionally, Vygotsky's theory of social constructivism stressed that optimal

learning occurs when the level of support is greatest in the beginning and decreases as the

learning progresses. Although Vygotsky never referred to it as such, other social

constructivist coined this concept as scaffolding (Powell & Kalina, 2009). Scaffolding is

the process in which the teacher or more competent peer provides appropriate guidance

and decreases the support as evident in learning progression. By scaffolding, the learner

receives the necessary assistance to be successful. Scaffolding, referred to by Vygotsky

as modeling and explaining, enables the learner to complete more difficult tasks with the

support of a teacher or peer (Powell & Kalina, 2009). Scaffolding requires the teacher to

provide students the opportunity to extend their current skills and knowledge. A more

challenging task may be given, and this therefore increases the level of rigor and

comprehension. Based on this analysis of scaffolding, it is evident that scaffolding is an

essential element of balanced literacy.

Lastly, Hubbard (2012) believed that a significant characteristic of the

constructivist theory is that much of the learner's knowledge is developed through social

interaction. Vygotsky (1978) asserted that tools such as written language and its symbols

enable people to communicate their learning to others. Effective social interaction has a fundamental role in the process of cognitive development. Social interaction offers humanity the opportunity to share knowledge through the use of psychological tools (Louis, 2009).

Teachers must be informed to make data-driven decisions regarding a student's instructional readiness. Tasks are administered with increasing levels of difficulty for the purpose of measuring the student's instructional level. Then, teachers use these data to guide instructional planning and learning tasks (Vygotsky, 1978). Vygotsky (1978) urged interaction and communication between the teacher and students about the curriculum and learning objectives to stimulate critical thinking within students. Through a cultural and social context, students are active participants in the learning process and take ownership of their learning. Subsequently, students begin to construct knowledge and apply meaning to their learning (Powell & Kalina, 2009). Reaching students within their zone of proximal development, scaffolding the instruction, and promoting communication are key factors of social constructivism and essential to balanced literacy (Green & Gredler, 2002; Powell & Kalina, 2009).

**Social constructivism and balanced literacy.** Balanced literacy asserts many of the important conditions of social constructivism. Both balanced literacy and social constructivism emphasize the positive impact that communication has on cognitive development. Vygotsky recognized the importance of social interaction as a trait of learning (Kalpana, 2014; Louis, 2009; Zaratskii, 2009). Balanced literacy provides opportunities in which learners are able to construct knowledge and understanding

through social interaction, a belief essential to Vygotsky's theory of social constructivism. Balanced literacy stimulates learning at a learner's instructional level and gradually increases the level of rigor while providing appropriate support. Often times, this is conducted through guided reading, one of the components of balanced literacy. Vygotsky believed that this social interaction and instructional support are pivotal to cognitive growth.

Furthermore, balanced literacy applies two ideas critical to social constructivism. Vygotsky's theory of social constructivism includes the zone of proximal development and scaffolding (Louis, 2009; Powell & Kalina, 2009; Yan-bin, 2009; Zaretskii, 2009). The zone of proximal development is evident in balanced literacy through guided reading, shared reading, and independent reading. Teachers assess students' instructional levels to guide instruction and provide appropriately leveled texts for students. At the same time, teachers introduce new concepts by scaffolding throughout each component of balanced literacy. As learners demonstrate mastery of learning, the amount of scaffolding is adjusted. The implementation of these vital ideas of social constructivism explain how balanced literacy leads to increased cognitive development and therefore increased student reading achievement.

**Review of Broader Problem**

Student achievement is the primary objective for educators universally (Fehrler, Michaelowa, & Wechtler, 2009; Marks, 2008); however, teachers face the consistently ongoing challenge of raising student reading achievement. Reading and comprehending texts are vital to students' academic success; yet, researchers find that far too many

students in elementary schools struggle to comprehend texts across all content areas (Stagliano & Boon, 2009). Years of research in previous studies have indicated effective ways to increase student reading achievement (Dean, Hubbell, Pitler, & Stone, 2012; Fountas & Pinnell, 1996; National Institute of Child Health and Human Development, 2000; Zarei, Shokrpour, Nasiri, & Kafipour, 2012). Moreover, research continues to be conducted to determine quality literacy instruction that yields increased reading achievement. Researchers recommend a balance of whole language and phonics instruction lead to increased student achievement in reading (Fountas & Pinnell, 1996; Tomlinson & Imbeau, 2010). Through the implementation of a balanced literacy framework that includes systematic phonics, access to leveled text, and scaffolding that supports the learner, the goal is that all students will experience increased reading achievement. Third-grade teachers can attain increased student reading achievement by implementing a balanced literacy framework (Dean et al., 2012; Maddo et al., 2011; Tompkins, 2010; Zarei et al., 2012).

Throughout my review of studies relating to balanced literacy, the results have included detailed analysis of how teachers have implemented balanced literacy. A common finding among the studies was that teachers struggle to properly implement balanced literacy because of a lack of clarity of the framework. Additionally, other findings revealed that a lack of minimal resources, materials, time, and professional development have been damaging to the implementation of balanced literacy. The review of literature has yielded the following topics for discussion: a detailed description of the

components of balanced literacy, implementation of balanced literacy, and teachers'

perceptions of balanced literacy.

**Balanced Literacy**

In an effort to increase students' reading achievement, schools, such as those in

the district under study, have implemented balanced literacy. Despite the varied

approaches to instruction that have been utilized over the past decades, students' reading

scores have remained virtually stagnant (National Institute of Child Health and Human

Development, 2013). However, in a response to students' low reading performance on a

national examination, California public schools implemented a new curriculum called

balanced literacy in 1996 (California Department of Education, 1996). This approach

enabled students to explore and develop their own understanding within a text (Reyhner,

2008). Based on the reading achievement improvements California experienced after

implementing balanced literacy, many educators are implementing and promoting a

balanced literacy approach (Wren, 2003).

Balanced literacy, a framework for reading and writing instruction, is a

philosophy of reading instruction that combines the most effective practices of systematic

phonics instruction and components of whole language (O'Day, 2009). It is a method of

teaching wherein phonics is combined with whole language learning in order to help

students acquire proficiencies in reading and understanding concepts (Reutzel & Clark,

2011; Uzuner et al., 2011). Balanced literacy is a combination of interactive strategies

with explicit and scaffold instruction (O'Day, 2009). Students are guided through several

instructional components starting with read aloud and progressing to independent

reading. The progression of the various components of balanced literacy is gradually passed on to the learner to develop mastery. Through balanced literacy, teachers provide a balance of instructional choice that includes systematic phonics, access to grade appropriate text, and scaffolding to support the learner. The goal of balanced literacy is to develop independent readers and increase reading achievement.

According to Maddo et al. (2011), balanced literacy is a curriculum that emphasizes balance in literacy instruction maintains a focus on reading and writing instruction that equally addresses all components of literacy. Balanced literacy is executed through seamless delivery of instruction across the components of read aloud, word study, shared reading, guided reading, independent reading, and writing (Marshall, 2015; Reutzel & Clark, 2011). Through teacher modeling and demonstrating, skills are developed including word study, word recognition, and reading comprehension, and strategies are taught of when to apply the skills. Teachers are continuously providing varied levels of support based on students' needs (Fountas & Pinnell, 1996). As a part of an effective balanced literacy approach, the teacher demonstrates in-depth knowledge as evidenced in the instruction of each component (Fountas & Pinnell, 1996).

**Word study**. As a component of balanced literacy, word study is vital to helping students become literate. Word study, based on phonics and vocabulary, includes the learning of sight words, decoding, spelling patterns, and word meaning which allows students to formulate meaning and communicate (Stygles, 2011; Wood et al., 2011). Recent research indicates vocabulary acquisition to have a profound correlation to reading comprehension (Carlisle, McBride-Chang, Nagy, & Nunes, 2011; Nagy,

Beringer, Abbott, Vaughn, & Vermeulin, 2003). A comprehension-based vocabulary literacy approach supports students in processing word meanings more deeply and stimulates complex, strategic learning (Wood et al., 2011). Word study is a valuable component to balanced literacy that leads to increased reading achievement. In fact, researchers commonly agree that the more students are engaged in analyzing roots, bases, and affixes, the higher their reading achievement (Carlisle et al., 2010; McCutchen, Logan, & Buangardi-Orpe, 2009; Wood et al., 2011). Beginning at third-grade, word study with a focus on base words and roots should be at the core of balanced literacy (Wood et al., 2011). The development of this understanding will support students' comprehension of more complex texts.

The act of promoting vocabulary literacy bridges vocabulary and comprehension using all aspects of literacy: reading, writing, listening, speaking, viewing, and visually representing (Wood et al., 2011). During word study, the teacher provides direct, systematic instruction on written language so that students develop the skills to decode and comprehend texts. The goal of word study is to allow students to explore the complexities of language throughout a wide array of genres including literary text, informational text, and poetry (Fountas & Pinnell, 2002). Through word study, students develop skills and strategies to analyze word meaning and structure and the conventions and forms of written language. As a part of balanced literacy, word study serves three essential purposes: "(1) to develop phonological awareness, (2) to increase phonics skills, and (3) to build students' word and structural analysis" (Teach for America, 2011, p. 155). With regard to word study, a student's vocabulary has a profound impact on

comprehension as it has been noted that proficient readers have a broader vocabulary (Wood et al., 2011).

     **Read aloud**. Read aloud is an essential activity that takes place during balanced literacy (Daane, Campbell, Grigg, Goodman, & Oranje, 2005; Lennox, 2013; Tompkins, 2010) and the most teacher-directed component. Teachers often utilize read aloud to introduce and reinforce reading strategies. The teacher accomplishes this by reading various types of texts and modeling the use of reading strategies through think aloud (Baker et al., 2013; Boulware–Gooden et al., 2007; Lennox, 2013; Ortlieb, 2013). The texts for read aloud is usually at the instructional level or frustration level of the students (Tompkins, 2010). The teacher selects texts on this level because it exposes students to more complex texts which they cannot read independently. Through read aloud, students deepen their understanding of text and develop strategies to apply to reading (Daane et al., 2005; Fountas & Pinnell, 1996; Lennox, 2013). Additionally, opportunities are provided for student questions and discussions (Fountas & Pinnell, 1996; Richardson, 2009). The purposes of read aloud include: "(1) to build book and print awareness, (2) to develop phonological awareness, (3) to model reading accuracy and fluency, and (4) to develop all students' listening and comprehension skills" (Teach for America, 2011, p. 144). Read aloud is an opportunity for students to focus on meaning and structure (Fountas & Pinnell, 1996).

     **Shared reading.** Shared reading is a whole group instructional component of balanced literacy that engages all students with the same text that is read with the teacher (Dewitz & Jones, 2013; Fountas & Pinnell, 1996; Richardson, 2009). The teacher and

students read together. An array of decoding and comprehension strategies are employed throughout the text. The teacher's responsibility through shared reading is to build meaning and structure so that students can gain meaning from text (Fountas & Pinnell, 2009). Students have the opportunity to discover new words and determine their meanings (Kesler, 2010; Miller & Schwanenflugel, 2008). Shared reading has four purposes that are shared across the components of balanced literacy, including: (1) build book and print awareness, (2) build phonics skills, (3) increase reading accuracy and fluency, and (4) advance reading comprehension strategies (Teach for America, 2011, Tompkins, 2013). Shared reading is a powerful component of balanced literacy that enables the teacher to reinforce reading skills and strategies while engaging students in rich literature.

**Guided reading**. Often referred to as the cornerstone of balanced literacy (Fountas & Pinnell, 1996; Routman, 2000; Tompkins, 2010), guided reading enables teachers to model and support students as they learn to read. When considering third to sixth grade students, Fountas and Pinnell (2009) later redefined guided reading as "an approach designed to help individual students learn how to process a variety of increasingly challenging texts with understanding and fluency" (p. 193). Guided reading is a component of balanced literacy that supports teachers in meeting the needs of all students so that they can become stronger readers (National Center on Response to Intervention, 2010). The high numbers of struggling readers throughout the intermediate and above grade levels indicate a clear need for the focused and purposeful instruction that defines guided reading. Guided reading provides the opportunity for students to

apply decoding and comprehension strategies while reading texts on their instructional

levels (Begeny & Martens, 2006; Cunningham & Allington, 2011; Fountas & Pinnell,

2009). Instructional level is defined as text that can be read with 90% accuracy (Fountas

& Pinnell, 1996).

When planning for guided reading, teachers develop small, flexible groups

consisting of six to four students (Fountas & Pinnell, 1996). The teacher determines the

students' reading level and needs through on-going diagnostic assessments and groups

students who are on the same reading level or have similar needs. Because membership

in the group is based on students' reading levels and needs, grouping is flexible. Text is

then selected on the instructional level which provides the teacher the opportunity to

scaffold the instruction (Fountas & Pinnell, 1996; Richardson, 2009). Effective guided

reading occurs when the teacher provides instruction at the highest reading level at which

the student can be successful with appropriate scaffolding (Fountas & Pinnell, 2009;

National Center on Response to Intervention, 2010). By selecting the text within the zone

of proximal development, students can be successful with scaffolding from a more

capable peer or adult (Vygotsky, 1978).

Within guided reading groups, students are able to apply strategies to convey

meaning from gradually increasing complex texts (Cunningham & Allington, 2011;

Fountas & Pinnell, 1996). Guided reading serves a variety of purposes based on the needs

of the students. The purpose of guided reading includes: (1) build book and print

awareness, (2) develop phonics skills, (3) improve reading accuracy and fluency, and (4)

develop reading comprehension skills (Teach for America, 2011). At the intermediate

elementary levels and beyond, the teacher uses guided reading to facilitate students in reading new or unfamiliar texts (Fountas & Pinnell, 2002).

**Independent reading**. A well-implemented balanced literacy program yields successful independent reading. Throughout independent reading, students are expected to apply the learned decoding and comprehension strategies as they read books on their independent reading levels. Independent reading helps to promote lifelong reading because students exhibit control in selecting the text and find reading more enjoyable (Fountas & Pinnell, 1996; Calkins, 2001; Sanders, 2012). There are strong associations between independent reading and reading achievement (Calkins, 2001; Fountas & Pinnell, 2009; Routman, 2002). Independent reading provides extended practice that aids reading development (Harlaar, Deater-Deckard, Thompson, DeThorne & Petrill, 2011; Sanders, 2012). The teacher's role in independent reading is to provide students with the tools essential to becoming independent lifelong readers (Fountas & Pinnell, 2009; Lee & Schmitt, 2014; Sanders, 2012). As independent reading supports the other components of balanced literacy, it shares the purposes of (1) increasing book and print awareness, (2) improve phonics instruction, (3) build reading accuracy and fluency, and (4) increase reading comprehension (Teach for America, 2011). When students have been provided with multiple reading experiences through read aloud, shared reading, and guided reading, they have the skills needed to read on their own (Fountas & Pinnell, 2009). Through independent reading, students can read confidently and build their own knowledge.

**Writing.** Writing is communicating through written forms. The development of writing is like the development of reading in that students will learn that writing is a way of expressing meaning. Similar to quality reading instruction, students need to have authentic purposes for writing (Anderson & Briggs, 2011). Writing instruction begins with the teacher modeling a skill or process, transitions to the teacher guiding students in the application of skills or processes, and culminates with students writing independently (Fountas & Pinnell, 2009). Teachers scaffold their instruction along the gradual release of responsibility continuum. The writing component includes: Shared Writing, Interactive Writing, Guided Writing, and Independent Writing (Fountas & Pinnell, 2009). Within Shared Writing, the teacher provides a mini-lesson and then models skills and/or strategies for composing messages, stories, or essays (Calkins, 2001). Throughout Interactive Writing, the teacher and students collaborate to develop written text. Guided Writing provides the opportunity for students to develop a written composition applying the modeled skill or strategy with the support of the teacher. The focus of writing instruction is to build independence so students are provided a large portion of time for Independent Writing (Calkins, 2001). During Independent Writing, students write for real purposes identified by the teacher. Writing instruction serves a variety of purposes: (a) to develop a love of writing, (b) to provide time for students to develop writing fluency, (c) to learn how to effectively communicate through writing, (d) to develop knowledge of the English written language system, (e) to understand the reading and writing connection, and (f) to be able to write across various genres (Fountas & Pinnell, 2009). Just as

students need to read to improve their reading, students must write to improve their writing (Calkins, 2001).

Teachers use the components of balanced literacy to support students as they gradually become more skilled readers (Fountas & Pinnell, 1996; Lee & Schmitt, 2014; Marshall, 2011). According to Fountas and Pinnell (2009), "An elementary education curriculum must comprise an articulated, cohesive system of language and literacy experiences" (p. 6). Additionally, the classroom provides the unique platform in which students are exposed to a variety of texts, discuss texts with their peers and others, and read for extended periods of time (Fountas & Pinnell, 2009). Through the gradual progression of the components of balanced literacy and increasing student responsibility, balanced literacy is considered a highly effective and robust teaching method that leads to increased reading achievement (Calkins, 2014; Lee & Schmitt, 2014).

**Implementing Balanced Literacy**

Kennedy and Shiel (2010) summarize the implementation of balanced literacy by stating "the stakes are high; a multifaceted approach to raising achievement in literacy … [that] holds much promise for the future" (p. 382). In a study that examined how the implementation of balanced literacy could increase reading achievement among students in an urban disadvantaged school, four first grade classes (including four teachers, 56 students, and their parents) were selected to examine the effects of implementing balanced literacy. The school devised a two-year plan to implement all components of balanced literacy in five phases. Assessments were administered to determine students' performance levels at the beginning of the study and interview data were gathered from

teachers, 20 randomly selected students, and parents. At the end of the study, student reading performance on a standardized reading test improved from an average score of 82 points in first grade to 98 points in second grade, Not only did the school's implementation of balanced literacy lead to increased reading achievement, but there was evidence that students acquired more reading strategies, were more persistent with reading, and reported enjoyment of reading.

Numerous studies have been conducted to examine how balanced literacy is implemented and what are the outcomes. In a study examining instructional practices from 101 elementary classrooms, Bitter et al. (2009) explored classrooms that have applied balanced literacy. The focus of the study was to determine which practices were effective in improving student achievement. Bitter et al. used classroom observations as the primary source of data while supplementing with teacher interviews. Teacher interviews focused on teachers' opinions about school policies and professional development. Like previous studies (Block, Oakar, & Hart, 2002; Frey et al., 2005), Bitter et al. found that instruction focused on reading and less time was given for writing. In addition, phonics instruction was less evident although vocabulary and word study were embedded in the balanced literacy instruction. Previous studies have found it effective to incorporate word study into shared reading and guided reading (Buckland & Fraser, 2008; Kesler, 2010; Stygles, 2011; Wood et al., 2011). Throughout the study, Bitter et al. noted application of higher level thinking among students and scaffolding instruction by teachers. Overall, the researchers concluded that balanced literacy is

effective in improving student achievement in elementary schools in high poverty communities.

Frey at al. (2005) conducted a study on balanced literacy to determine: (a) how much time in a literacy block is designated for each component, (b) how a balanced literacy classroom looks, and (c) how a balanced literacy school looks. As in the previous study, this study examined elementary schools within a high-poverty area servicing students in kindergarten through sixth grades. The 32 schools in the study were part of a district which mandated a 90-minute morning block for balanced literacy. Frey at al. triangulated the data through classroom observations, inventories of the classroom and school environments, and teacher interviews and surveys. Classroom observations provided data about how the teacher designated time for each component within their literacy blocks, and the environment inventories provided data about how the classrooms and schools should look.

In analyzing how teachers designated time for each component of balanced literacy, Frey et al. (2005) found that teachers spent most time (20%) on independent writing. This was followed by read aloud (18%) and independent reading (17%). While shared reading and guided reading were a part of the literacy block, they did not occur on a daily basis. Instead, these components were on a weekly schedule. These findings indicate that there may not be sufficient instruction and modeling. As a result, Frey et al. identified some weaknesses in the balanced literacy implementation within these schools. Primarily, there was a lack of direct instruction and modeling that leads to a gradual release of responsibility. Instead of the essential element of direct instruction occurring

(Carnine, Silbert, Kame'enui, & Tarver, 2010), students were immersed in independent reading and writing. Although independent reading and writing are components of balanced literacy, these components are meant to follow the direct instruction and modeling of specific skills delivered through shared and guided reading and writing. As Lee and Schmitt (2014) indicated in their study, explicit direct instruction, effective scaffolding, and a gradual release of responsibility builds strategic readers (Carnine, et al., 2010). Frey et al. also recommended that the schools increase the frequency of shared reading and guided reading.

The environmental inventories provided data to explain what a classroom and school that implement balanced literacy look like. Within classrooms that implemented balanced literacy, Frey et al. (2005) found "classroom libraries with books grouped by reading level, an area designated for read aloud and other activities with the whole group, literacy stations, and literacy displays" (Frey et al., 2005, p. 278). Key features in the classroom also included quiet reading areas, directions on selecting "just right" books, and student work posted. Additionally, Frey et al. identified traits that are evident throughout schools that adopt balanced literacy. Like classrooms, schools should have a variety of literacy displays, designated areas for reading, and displays of student work. As schools support the implementation of balanced literacy, Frey et al. found that 91% of the schools had books for teachers' use within the school library while 81% of the schools had a separate professional development library for teachers.

The implementation of balanced literacy can have positive effects on all students including English Language Learners and struggling readers. O'Day (2009) completed a

three year study with teachers, administrators, and literacy coaches in a balanced literacy district with over 24,000 English language learners. The researchers claimed that specific components of balanced literacy were far more beneficial for English language learners than other literacy programs. O'Day identified explicit instruction, literacy discussions, and making meaning activities as essential to the language development of both English language learners and struggling readers. Balanced literacy is a framework which can support teachers in increasing reading achievement among all students, including English language learners and struggling readers.

Current research embraces balanced literacy as a framework for quality literacy instruction; however, the implementation of the approach can be significantly different. Bingham and Hall-Kenyan (2013) surveyed 581 teachers from three school districts in the United States and representing kindergarten through sixth grade to assess their implementation of balanced literacy in their classrooms. These teachers were in a district where balanced literacy was supported on both the school and district levels. Although balanced literacy is enacted through the instructional routines of read aloud, word study, shared reading, guided reading, independent reading, and writing (Fountas & Pinnell, 1996), teachers' perceptions about balanced literacy and its components restrict the consistent practice of these instructional routines (Bingham & Hall-Kenyan, 2013; Shaw & Hurst, 2012). After gathering survey data about the teachers' implementation of balanced literacy activities, the researchers examined results through an univariate analysis of variance (ANOVA), multivariate analysis of variance (MANOVA), and multivariate analysis of covariance (MANCOVA). The results of the study supported

findings in previous studies (Frey et al., 2005). The implementation of balanced literacy differed from one teacher to another teacher. Students most often participated in independent reading occurring about four times a week while other components of balanced literacy; guided reading, shared reading, word study, and read aloud, occurring an average of more than three times a week. Additionally, Bingham and Hall-Kenyan reported that there was a greater focus on the reading components of balanced literacy. Researchers found that the variance in implementation of balanced literacy was a function of the grade level. Previous research also supports that effective literacy instruction is evident when the instruction is adopted to meet the needs of the grade levels and age group that they teach (Anderson & Briggs, 2011; Block et al., 2002; Conley & Wise, 2011; Hoffman et al., 2000). Findings of this study suggested that while balanced literacy may be implemented, there may not be a balance in the basic routines that are fundamental to balanced literacy.

**Teacher Perceptions of Balanced Literacy**

The perceptions and opinions developed by teachers make up their belief systems. Teachers' beliefs impact their teaching style and practices. Often, a teacher's perceptions and opinions are passed on to the students through their teaching (Barnyak & Paquette, 2010). In a review of the research on balanced literacy, previous studies present teachers' beliefs and perceptions of balanced literacy.

Barnyak and Paquette (2010) conducted a study examining preservice teachers' attitudes and beliefs about reading instruction. Research has shown that a teacher's beliefs and practices are guided by the way they were taught unless preservice training

addresses the preconceptions (Barnyak & Paquette, 2010; Perkins, 2013). A teacher's

beliefs have different effects on the delivery of reading instruction. Teachers' belief

systems usually include the selection of instructional methods, knowledge of curriculum,

and the management of diverse needs (Barnyak & Paquette, 2010; Perkins, 2013).

Barnyak and Paquette (2010) examined if university coursework altered the beliefs about

reading instruction of 75 preservice elementary teachers. An effective teacher preparation

reading program presents a balanced view of reading instruction through the following

concepts: phonics, phonemic awareness, oral language, word identification, vocabulary

comprehension, fluency, assessments, and the management of literacy instruction

(Barnyak & Paquette, 2010; Reutzel & Cooter, 2007). While the preservice teachers were

advocates for teaching skills in order to promote comprehension, the beliefs about the

integration of skills were weak. At the conclusion of the study, Barnyak and Paquette

(2010) noted that preservice teachers must examine their beliefs as compared to best

literacy practices in order to make the most appropriate instructional decisions.

Moreover, teachers' perceptions of reading and the instruction of reading are

often influenced by their personal reading histories (Barnyak & Paquette, 2010; Reutzel

& Cooter, 2007). Perkins (2013) conducted a qualitative phenomenography study among

12 student teachers training to be primary school teachers. Based on her experience as a

teacher educator, Perkins (2013) asserted that student teachers struggled to understand

what reading is and how to teach reading. Similarly, teachers struggle to understand

balanced literacy (Queenan, 2011). The focus of the study was to examine student

teachers' perceptions of the teaching of reading through interviews. Through the study,

three main features emerged; understanding what reading is, gaining teaching skills, and motivating pupils. Perkins (2013) found that participants "assumed that the way they learned was the way they learned to teach" (p. 301). Additionally, student teachers perceived two components of the reading process: decoding and comprehension, but varied on the emphasis and sequence of the components. The knowledge that is needed to teach reading is not defined distinctively. Perkins (2013) stated that student teachers desired a clear system for teaching reading and they were learning how to apply reading theory into practice.

Reisboard and Jay (2013) conducted a study among 150 first through fifth grade teachers in six schools in an affluent northeastern suburban district. Researchers examined teacher perceptions of a new basal reading program as a key instructional material. Guided by recent research on reading which emphasized balanced literacy, Houghton Mifflin Harcourt (HMH) designed a basal reading program to meet the diverse needs of all students (Reisboard & Jay, 2013). Following the research-based approach of balanced literacy, HMH's reading program included six instructional strands: building vocabulary, supporting comprehension, using effective instructional approaches, teaching with effective texts, connecting writing and reading, and meeting all students' needs through differentiation and strategic intervention. The development of the new basal reading program provided a consistent and systematic method to deliver skill and strategy instruction across all grades (Reisboard & Jay, 2013). Overall, teachers had favorable perceptions of HMH's reading program, which applied a balanced literacy approach, and the blend of whole class and small group instruction raised teachers' confidence levels.

Additionally, teachers noted improvements in student reading and were to apply useful instructional strategies that were aligned to balanced literacy and addressed the needs of all students. Teachers' perceptions of the HMH reading program was favorable and they perceived it to contribute to a successful year of teaching and learning (Reisboard & Jay, 2013).

Shaw and Hurst (2012) conducted a study with 111 teachers who taught Kindergarten through grade six in a suburban mid-western United States school district. The district implemented a balanced literacy framework as a way to respond to students' needs and obtain high academic achievement. Similarly, a previous study was conducted in a San Diego school district to determine if a balanced approach to literacy instruction was associated with increased reading achievement (Bitter et al., 2009). Researchers in the San Diego study concluded that a balanced approach which included higher-order questions, student engagement through accountable talk, and scaffolding of instruction can result in increased student achievement (Bitter et al., 2009). In the more recent study, Shaw and Hurst (2012) used surveys and classroom observations in a quantitative study to ascertain teacher perceptions and beliefs about balanced literacy and its implementation. Findings from the study showed the majority of the teachers had an acceptable understanding of balanced literacy; yet, there were differences in how the components were implemented.

Furthermore, Shaw and Hurst's (2012) study gave insight to teacher perceptions of what balanced literacy is and the rationale for implementing each component. Research has shown that teachers lack a clear understanding of balanced literacy

(Queenan, 2011). When teachers lack a clear understanding of balanced literacy, they cannot adequately implement, modify, or dismiss strategies or approaches (Shaw & Hurst, 2012). The researchers analyzed teachers' definitions of balanced literacy and found that teachers had an acceptable definition of balanced literacy but placed greater focus on structures rather than literacy components. Shaw and Hurst (2012) found that additional professional development could enable teachers to more fully understand the balanced literacy framework. The other critical finding in the study is the emphasis on each component. The time allotted for each component of balanced literacy is an important alterable determinate (Bitter et al., 2009). In the study, the areas of reading comprehension and writing dominated instruction (Shaw & Hurst, 2012). When compared to the San Diego study, these two areas positively contributed to student achievement (Bitter et al., 2009). Shaw and Hurst (2012) concluded that the major implication is that teachers implement what they know about balanced literacy.

Bingham and Hall-Kenyan (2013) completed a study to examine teachers' beliefs about a balanced literacy framework. The study included 581 teachers of grades kindergarten through sixth from three districts in the United States. Researchers used a survey to gather data about the most important literacy skills promoted during reading instruction and teachers' beliefs about effective reading instruction. Survey results revealed that 95% of the teachers' beliefs are structured on a skill-based philosophy. This means that the teachers supported both whole language and phonics based philosophies. Balanced literacy has been described as a blend of whole language and phonics based approaches (Barnyak & Paquette, 2010; Shaw & Hurst, 2012). The teachers' beliefs

support a balanced theoretical orientation. Additionally, when analyzing teachers' beliefs about literacy skills, the teachers perceived all literacy skills as important while rating comprehension as most important to helping students learn how to read (Bingham & Hall-Kenyan, 2013). Further analysis showed the value teachers placed on specific literacy skills. Third to sixth grade teachers valued comprehension skills as more important than phonological awareness, concepts of print, alphabetic principles, and phonics. The data from this survey revealed that teachers' instructional beliefs reflect a balanced literacy mindset (Bingham & Hall-Kenyan, 2013). Similar to the teachers' perceptions of balanced literacy, current research suggest the need for a balanced approach to literacy instruction as a means of increasing reading achievement.

**Conclusion**

The review of literature focused on the theoretical framework of constructivism, balanced literacy, its implementation, and teachers' perceptions of balanced literacy. The research showed that balanced literacy leads to high academic achievement (Brown & Fisher, 2006; Shaw & Hurst, 2012); yet, teacher perceptions and belief systems about balanced literacy can have a direct influence over students' reading success (Barnyak & Paquette, 2010; Griffith et al., 2013). The discussion addressed the components of the research-based instructional framework of balanced literacy and resources regarding the effectiveness of balanced literacy, which are applicable for third-grade teachers to use as a means of increasing reading achievement among third-grade students. Research consistently support how balanced literacy supports reading achievement. In conclusion,

the body of evidence indicates that implementing balanced literacy to increase third-grade students' reading achievement is highly dependent on teacher practice.

**Implications**

The balanced literacy framework used in this study applies a constructivist approach to reading development. The local district adopted balanced literacy to address reading achievement among elementary students and as a part of the Read to Succeed Act to specifically address the needs of third-grade students. Balanced literacy instruction provides the appropriate response to students' needs and leads to increased academic achievement (Shaw & Hurst, 2012). Based on the anticipated findings through data collection and analysis, several implications can emerge for possible project directions resulting from this qualitative case study.

The goal of reading instruction is to provide effective lessons that enable students to master grade level skills and become proficient readers (Common Core, 2012; South Carolina Department of Education, 2015). The district responded to low reading test scores by implementing balanced literacy. The findings from this qualitative study on teachers' perceptions of balanced literacy have a potential to make a difference for the district. Results from the study will help to understand if teachers' perceptions about balanced literacy influence their implementation. The teachers' perceptions of balanced literacy influence the implementation and therefore effects reading achievement. A review of teachers' perceptions could enable stakeholders to consider the support teachers need in implementing balanced literacy and achieving the district's goal of increasing students' reading achievement.

Additionally, the development of a comprehensive and systematic professional development could be considered. The district offered professional development at the beginning of the balanced literacy implementation in 2014. A new professional development workshop would help third-grade teachers to implement the balanced literacy framework by clarifying misperceptions as well as monitor and respond to the needs of the learners, expand their repertoire of effective instructional practices, and engage students so that they will learn to read more effectively. Furthermore, the professional development would incorporate essential resources and on-going support to assist teachers in transitioning, building competence, and exploring innovative strategies to increase reading achievement among third-grade students. An anticipated result of the professional development workshop would be to increase third-grade students' reading achievement and improve achievement on the state mandated reading test.

## Summary

In summary, I explained how a local urban school district implemented the balanced literacy framework to address low reading achievement among third-grade students. District leaders planned, coordinated the development, and implemented the balanced literacy framework to provide research-based improvements to its reading curriculum. The local district determined this reform measure critical because of the steady decline in third-grade students' reading performance on state testing and guidelines stipulated in South Carolina's Read to Succeed Act of 2014 for third-grade students' reading achievement.

The main idea of this qualitative study will be to examine teachers' perceptions of the balanced literacy framework. Subsequently, the guiding question I will address will be "What are teachers' perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement?"

In addition, I presented an analysis of other research addressing concerns about reading achievement. The federal government consistently holds public schools accountable for maintaining adequate student achievement for all students in the United States for the purpose of preparing students to compete and function successfully in a global society (United States Department of Education, 2010). Schools are in need of effective, research-based instructional strategies that provide authentic learning experiences and support the achievement of students with differing learning needs. To equip students with skills to be successful in the real world and pass the state reading test, the local district in the study required all teachers to implement the balanced literacy framework to guide daily reading instruction.

Furthermore, operational terms and definitions were provided. Operational terms are presented throughout the research study. I provided clear and precise definitions to convey an understanding of terms and how they are relevant to the information presented in the research study.

The literature review included an analysis of current research addressing the frameworks of constructivism and balanced literacy. The frameworks are research-based structures that have been proven to positively impact student achievement and teacher practice. Significant evidence was reported from the empirical studies detailing how the

frameworks provide students with the skill-based and meaning-based scaffold instruction which prepares them to demonstrate proficiency in reading, experience increased reading achievement, and develop as strong, lifelong readers. Balanced literacy establishes the critical foundation for lifelong, independent readers (Bitter et. al., 2009). Lastly, a discussion was presented on likely implications and limitations that may result in conducting the study.

In section 2, the methodology section, I provide a detailed description of the qualitative case study approach that has been applied. Section 2 describes the sampling procedures, procedures for data collection, types of collected data, and data analysis. Section 2 is significant in that it establishes the foundation to address the research question and subquestions based on the teachers' perceptions regarding the implementation of a balanced literacy framework.

In section 3, each component of the study will be explained. This intensive description will include an introduction to the project, goals, rationale for selecting the project, and justification of how the project addresses the problem in the study. Section 3 will be supported with a subsequent review of literature focused on the project. The project will encompass a plan that details the implementation process, required resources, timeline, and the roles and responsibilities of the individuals involved in the project. Additionally, an evaluation tool will be devised and employed to provide feedback about the project. As a part of the evaluation tool, a justification for the selection of the evaluation tool, the evaluation goals, and the names of the stakeholders will be provided.

The section will conclude with a discussion of the implications for social change and the significance of the project on the local level and within the broader community.

Lastly, Section 4 will provide analysis of what was learned, experiences in conducting the study, and an explanation of how the project can benefit students experiencing low reading achievement. This reflective section will also provide the opportunity to acknowledge the project study's strengths and limitations while also noting recommendations for future research.

Section 2: The Methodology

**Introduction**

With this qualitative case study, the problem was that third-grade students were struggling to demonstrate proficiency in reading grade level text. According to the South Carolina Read to Succeed Act (2014), third-grade students in South Carolina need to demonstrate reading proficiency as measured by the South Carolina reading assessment, ACT Aspire, administered at the end of the school year. The school district in this study implemented a balanced literacy framework in 2014. A qualitative case study design was applied in order to examine teachers' perceptions of the balanced literacy framework, the pros and cons of this approach, and additional support needed to better support students through the balanced literacy framework.

Throughout the methodology section, I have outlined the research design and provided justification for applying a qualitative design. Additionally, I have detailed the selection of the setting, sampling procedure and participants' description, and procedures for gaining access to participants. An in-depth plan for developing a positive working relationship with participants, ethical considerations, and data collection has been described. Lastly, I have explained data analysis, including an overview of how the data were analyzed, coded, triangulated, and assessed for credibility and accuracy.

**Research Design and Approach**

A qualitative case study was used to gain insight into teachers' perceptions regarding the balanced literacy framework. A qualitative design is best suited when a researcher seeks to explore a phenomenon and the variables are unknown (Creswell,

2012; Creswell & Miller, 2000). Furthermore, Creswell (2012) defined qualitative research as an inquiry process of understanding based on distinct methodological traditions of inquiry that explore a social or human problem. A case study is an "in-depth description and analysis of a bounded system" (Merriam, 2009, p. 40). For this study, a case study approach supported flexibility in obtaining meaningful information to develop a rich detailed description that would capture the full complexity and uniqueness (Lodico, Spaulding, & Voegtle, 2010) of the teachers' perceptions of the balanced literacy.

With qualitative research, the researcher structures "a complex, holistic picture, analyzes words, reports detailed views of informants, and conducts the study in a natural setting" (Creswell, 2012, p. 15). Qualitative research, inductive, interpretive, and holistic, supports the reporting of detailed multiple perspectives of the perceptions of implementing the balanced literacy framework. A qualitative study also aligned with selecting a small purposeful sample to learn and understand the perceptions of the participating teachers. Lastly, a quantitative design would not be beneficial because of the potential to overgeneralize the findings and overlook pertinent details about the perceptions of the participants (Creswell, 2012; Lodico et al., 2010).

A key characteristic of qualitative research is that it examines a central phenomenon, or key idea, which in this case was the balanced literacy framework. Although there are multiple approaches for qualitative research, the qualitative design applied to the study was a case study. A case study is "a detailed examination of one setting, or a single subject, a single depository of documents, or one particular event" (Bogdan & Biklen, 2007, p. 59). Although case studies and ethnographic studies both

gather data about a central phenomenon from multiple perspectives, the researcher gains insight by becoming a part of the studied group within an ethnographic study. I declined an ethnographic study because the teachers' perceptions were not based upon the students' cultural backgrounds. Furthermore, a case study design allowed me to ask how and why questions without manipulating the behavior of the participants (Lodico et al., 2010; Yin, 2009).

Along with these characteristics, I focused on establishing a rich, thorough understanding of the teachers' perceptions of the balanced literacy framework to provide insight or develop a generalization (Merriam, 2009) regarding how the findings of this study aligned with the literature. Because the focus of this study was teachers' perceptions of the balanced literacy framework and a specific case had been identified, this study fit most closely with an instrumental case study. With an instrumental case study, the researcher examines a case that provides insight into an issue (Creswell, 2012). Applying an instrumental case study supported understanding the interconnectedness of the balanced literacy framework, scaffold instruction, and the zone of proximal development for the purposes of improving teachers' instructional practices and student learning. Furthermore, the instrumental case study research allowed me to obtain and understand participants' perceptions of the balanced literacy framework (Merriam, 2009).

In gauging the appropriateness of a qualitative design in comparison to a quantitative design, an explanation was merited to justify the selection of a qualitative design. With a qualitative design, the sampling method is purposeful or intentional based on people who can provide the best information for understanding the phenomenon. In

this bounded qualitative study, it was essential that the participants whom I purposely selected were in the same setting, experienced the same event, and were directly connected to the research problem (Creswell, 2012). A qualitative study was determined appropriate for answering the guiding question of this study. The semistructured interviews provided insight about teachers' instructional practices, professional resources, methods for monitoring and assessing student learning, and teacher-student relationships. I conducted one-on-one interviews to demonstrate sensitivity to ethical issues and challenges by building rapport and commuting to the workplace convenient for the participants (Creswell, 2012). Moreover, observations of the balanced literacy instructional period and focus group discussions further developed an understanding of participants' perceptions.

A quantitative design was not applied as it was determined to be ineffective in adequately answering the study's guiding research question and subquestions. In comparison to a qualitative design, a quantitative design summarizes the data numerically, whereas a qualitative design provides an in-depth analysis of such phenomenon (Creswell, 2012; Oliver, 2014). In using numerical data, I would not be able to disclose a descriptive account of teachers' perceptions of the balanced literacy framework. Additionally, a quantitative design required a less effective practice of using systematic random sampling to identify participants and sites. The sampling methods aligned with quantitative research provide a representation of population so that the findings can be generalized. For the purpose of this study, the findings were not generalized. Instead, the findings within the bounded system explained the phenomenon

of teachers' perceptions of balanced literacy among the third-grade teachers in the study.

With a quantitative approach, the researcher distributes anonymous questionnaires or

requires participants to come to an experimental laboratory, thereby removing the

opportunity to collect data in the participants' natural setting and establish rapport with

participants. Furthermore, quantitative designs often involve the use of another

researcher's instrument (Creswell, 2012). On the other hand, a qualitative design allowed

me to generate open-ended questions relevant to the study, in contrast to a quantitative

design that uses closed-ended questions to collect data (Creswell, 2012; Oliver, 2014).

Although open-ended questionnaires are appropriate for a qualitative study and can

provide many responses to analyze, these questionnaires are detached from the context,

the participants' workplace. As such, this data collection process "may not represent a

fully developed database with rich detail as is often gathered in qualitative research"

(Creswell, 2012, p. 220). For the reasons presented, a qualitative design was most

appropriate for the study.

<div align="center">**Setting and Sample**</div>

**Setting**

The school district for this study was a large urban public school district located

in central South Carolina. It was among the largest in the state, servicing nearly 23,000

students in 28 elementary schools, nine middle schools, eight high schools, one specialty

school, and one charter school. The district implemented the balanced literacy framework

in the 2014-2015 school year following the passage of South Carolina's Read to Succeed

Act. Within the district, there were 1,869 third-grade students of different ethnic

backgrounds, ability levels, and socioeconomic statuses. According to the district's

demographic report, 75.4% of the student population as of 2015 were African American,

18.7% were Caucasian, and 5.9% represented other ethnicities. Additionally, 16.8% of

students were enrolled in the gifted and talented program and 14.3% of students were

serviced by special education. Although there were small groups within the district that

represented more affluent communities, the vast majority (78.3%) of students in the

district represented low socioeconomic families from urban, suburban, and rural

communities. Of the 28 elementary schools, 11 were Title 1 Schools, of which two were

Nationally Distinguished Title 1 Schools. In comparison to state performance, the district

had a lower percentage of students meeting and exceeding grade level expectations and a

greater percentage of students in need of support as measured by the 2015 state

assessment ACT Aspire (South Carolina Department of Education, 2015). South Carolina

had 37.2% of students meeting and exceeding grade level expectations, whereas the

district had 30.9% of students meeting and exceeding grade level expectations. In

contrast, South Carolina had 34% of students in need of support while the district had

42% of students in need of support (South Carolina Department of Education, 2015).

Each of the three elementary schools selected for the study had populations between 350

and 550 and were identified as Title 1 Schools, as 100% of the population received

free/reduced lunch. The student body at each of the three school sites was largely

comprised of African-American students with Caucasian and Hispanic students

representing less than 10% of each of the school's population. The learning environment

within the schools included general education, gifted and talented education, English

second language programs, and special education including learning disabled, developmentally delayed, emotionally disturbed, orthopedically impaired, and other learning impairment as outlined in a 504 plan.

**Participants for the Study**

For the purpose of this case study, a total of five third-grade teachers were asked to participate from the three schools in the district. Five participants ensured that at least 50% of the schools' third-grade teachers would be represented in this study. Additionally, a participant pool of this size had the potential to produce a large amount of data in order to achieve saturation in deciphering the effects of the balanced literacy framework in regards to increasing students' reading achievement (Merriam, 2009). I adopted the ideology that "it is better to select a few…to provide an in-depth understanding of the phenomenon" (Creswell, 2012, p. 234). The sampling strategy was purposeful sampling, homogeneous, to recruit participants who were utilizing the balanced literacy framework at the present time and able to provide vital information to contribute to the study's guiding question (Lodico et al., 2010). Purposeful sampling is when the researcher intentionally selects individuals who share a similar trait and are believed to facilitate understanding of the central phenomenon (Bogdan & Biklen, 2007; Creswell, 2012). It was also important to select the participants purposefully so that I could collect data that focused on the problem and the research question (Creswell, 2012). Participants were selected based on their ability to build understanding of the phenomenon and experience with the balanced literacy framework. Because I was employed in an elementary school within the school district for the study at the time of data collection, the participant

selection process considered teachers employed at other elementary schools in the district.

**Criteria for Participant Selection**

The criteria for selecting participants was third-grade teachers who (a) possess 3 or more years of teaching experience, (b) participated in the district's balanced literacy professional development, and (c) have been implementing the district's balanced literacy framework since its implementation in the beginning of 2014-2015 school year. The program was in its second year of implementation.

I was currently employed as a school-based administrator at an elementary school within the same district as the participants; however, I did not hold a supervisory role over them. In my role as a school-based administrator, some of my duties included participating in the district's professional development on balanced literacy alongside the participants in this study and evaluating teachers' progress in implementing the balanced literacy framework within my school building. Therefore, it was critical for me to employ ethical measures to protect them. None of the participants selected were employed at the same school where I worked.

**Access to Participants**

After receiving permission form Walden University's Institutional Review Board (IRB) and the school district's research committee, the principal at each of the three schools received a copy of the district's permission to conduct research letter. The principals at each of the three schools were asked to provide a list of teachers who met the criteria to participate. The list was generated based upon the teacher's years of

experience, participation in the district's professional development on balanced literacy, and the implementation of balanced literacy. An invitational letter (Appendix F) was sent to all eligible participants, and the first five teachers who responded and accepted the invitation to participate became participants in the study. I communicated with participants through face-to-face contact, e-mail, and/or telephone calls (Appendices G, H, & I).

**Researcher-Participant Working Relationship**

It is pertinent to establish a good rapport with participants in order to minimize feelings of threat or vulnerability and obtain rich, in-depth information (Bogdan & Biklen, 2007). I explained to participants that all information shared would be kept confidential and that my role as the researcher was not evaluative. Following the interviews, observations, and focus group discussion, participants had the opportunity to read and revise their transcriptions to ensure accuracy and make corrections (Bogdan & Biklen, 2007; Creswell, 2012). This process is known as member checking.

**Protecting Participants**

Protecting the participants' rights is of paramount importance in any research study. Before conducting the study or contacting participants, I obtained approval from the IRB of both Walden University and then the school district. To the university's review board, a full description was provided that included an estimated time of 6 weeks for the study with approximately 1 hour for each one-on-one interview in the participants' natural setting and 1.5 hours for the focus group discussion at a centrally located public library. Additionally, the list of interview questions (Appendix J) and a

disclosure of potential risks to participants and the site was provided to the university's IRB (Creswell, 2012). After obtaining approval from Walden's IRB, I followed the school district's review board and submitted a research proposal to the district's research committee. In addition, I submitted a copy of my certificate verifying training through the National Institutes of Health (See Appendix D) as a requirement for protecting research participants. According to the district's policy, participation in the study was voluntary, and principals and teachers had the right to refuse participation. In the event that a school site refused participation, another school in the district with similar demographics was to be selected. I provided a copy of the letter from the district's research committee to the principal at each school site to indicate permission to conduct research before contacting teachers to participate in the study.

In accordance with district research guidelines, the district needed to know how the research will benefit students in the district. At the conclusion of the study, I disclosed the findings with the participating teachers, principals, and the district's research committee as recommended by Creswell (2012). First, a one-page executive summary that focused on the key findings and implications of the study was presented to the district's research committee. With this executive summary, I obtained permission from the district's research committee to present a research report to the participating teachers and school leaders. Moreover, a short research report was developed that clearly and concisely summarized the results and highlighted key findings and included the problem studied, the questions asked, data collection, and the major results and implications for practice. An abstract was included to provide an overview of the results.

All data that were collected, audio recordings of the interviews and focus group discussion, all transcriptions, and field and reflective notes have been stored in a password-secured computer file. In accordance with Walden's IRB guidelines, I will destroy all data after 5 years.

**Ethical Considerations**

As the researcher, there is a need for me "to be aware of and anticipate ethical issues in [the] research" (Creswell, 2012, p. 22). In conducting the study and collecting the data, it is pertinent to exercise respect for both the participants and research sites and eliminate risk to harm. Participants were provided a consent form that also outlines the right to withdraw from the study at any time as well as choose not to respond to individual questions. Additionally, participants' confidentiality is essential, so no names were disclosed in the study. To support confidentiality, participating teachers were assigned a letter. Furthermore, I obtained signed consent forms and confidentiality agreements prior to conducting the interviews, observations, and focus group and participants did not receive compensation, rewards, or benefits. At all times, I practiced the ethical practices advocated by Creswell (2012).

My ethical practices included efforts to establish rapport and trust with the participants by taking the time to become acquainted with them. If participants had any questions or concerns, I addressed those at all times throughout the study. Participants were provided a full disclosure of the nature of the study, interviews, observations, and the focus group discussion. I communicated to all participants that interviews and the focus group discussion will be recorded, the time needed for each one-on-one interview,

observation, and focus group, as well as the possibility to ask additional questions as needed. According to the recommendations by Merriam (2009), I arranged a convenient date and time to meet with teacher participants to conduct uninterrupted private interviews.

## Data Collection

When developing the data collection plan, I applied strategies from Creswell (2012) and Merriam (2009). To begin, I developed a list and explanation of the types of data needed, how the data were collected, the schedule for data collection, and how the study was administered in an ethical manner. This data plan detailed the appropriate structures and ethical procedures that were followed (Creswell, 2012).

With this study, I used the following forms of data collection to address the guiding question in the study: (a) one-on-one semistructured interviews, (b) observations of teachers' implementation of the balanced literacy framework, and (c) a focus group discussion. For the one-on-one interviews and focus group discussion, I included an audio recording to support an accurate account of participant's responses. These varied methods of data collection supported my understanding of third-grade teachers' perceptions of a balanced literacy framework.

### Interviews

The primary source of data was the semistructured one-on-one interviews. The procedures for conducting each interview remained consistent. I will reviewed the purpose of the study, applied ethical interview practices, and used ice breaker questions to build a substantial level of trust with participants (Creswell, 2012). I developed an

interview protocol to provide structure. The set of questions for the protocol were developed based on my teaching and professional development experiences and my research on balanced literacy. An interview protocol was created to ensure that the appropriate questions will provide specific information that adequately addresses the study's guiding questions and subquestions (Creswell, 2012). The interview protocol (See Appendix A) included 10 questions that provided the information needed to understand the effects of implementing a balanced literacy framework for students who struggle to demonstrate reading proficiency.

Each of the five participants was interviewed individually with each interview taking approximately 45 minutes as dependent on participants' responses. Prior to the interview, I allowed the participants to identify a date within a two-week window, a time after normal school hours, and a location at the school for the interview. I tested and used an audio-recorder while conducting the interview. These recorded interviews were semistructured with a mixture of structured and flexibly worded questions (Merriam, 2009). Lastly, I thanked participants for their willingness to participate in the study and gave them the opportunity to read and revise their transcriptions to ensure accuracy and make corrections at a later date. This process is referred to as member checking (Creswell, 2012; Merriam, 2009).

**Observations**

Observing the participants in the classroom setting is another way to gain a deeper understanding of their perceptions of balanced literacy. I observed the participants implementing balanced literacy within a week after conducting the one-on-one interview.

I observed specifically for participants' perceptions of the balanced literacy framework and points the participants mentioned during the interviews. The observations took place within one week following the interview and throughout the duration of the teacher's balanced literacy instructional period of 120 minutes. I recorded notes in a table which I created in Microsoft Word. The table included rows for each component of balanced literacy: read aloud, word study, shared reading, guided reading, independent reading, and writing. In addition, the table included columns labeled teacher moves, student moves, time allotted, and order in lesson. The classroom observations provided data to expand on ideas expressed in the interview and either supported or refuted participants' responses.

**Focus Groups**

After the one-on-one interviews and observations were conducted, I conducted a focus group discussion with the same five participants selected for the study. The responses during the focus group served as a third source of data. The questions for the focus group were largely developed from emerging themes from the interview responses and observations. The focus group discussion provided an opportunity for me to follow-up and gather more information about common themes that emerged from the interviews and observations. Before engaging in the focus group discussion, participants were reminded of their signed confidentiality agreement stating that the names, roles, school assignments, and discussion are to remain confidential. Each participant used the same letter assigned to them for the interviews and participants referred to each other by participant letter to further protect anonymity. I tested and used an audio-recorder during

the focus group discussion so that responses could be recorded and reviewed later. The focus group was a large group discussion over the course of approximately an hour and a half to allow participants to engage in rich discussion about balanced literacy. The focus group took place in a local branch library that was centrally located to each participants' school site. Together, the one-on-one interviews, observations, and the focus group discussion enabled the researcher to strengthen the development of themes, provide more information, expand on ideas, and give more depth of the phenomenon.

### Data Analysis

Although data collection and data analysis are largely occurring simultaneously with qualitative research (Creswell, 2012), the researcher becomes immersed in a process of making sense of the data. I applied Creswell's (2012) steps as I analyzed the data. These steps included (a) preparing and organizing data, (b) thoroughly reading and coding all data, (c) coding data to generate descriptions and themes, (d) represent and report findings through a narrative discussion, (e) interpreting the findings of the data analyzed, and (f) validating the accuracy of the findings of the analyzed data (Creswell, 2012). Following these steps supported me in preparing, organizing, and interpreting the data. I transcribed by hand the recorded interviews, focus group discussion, and observations within 4 to 72 hours after each session. I read the data, marked it by hand, and divided it into parts by color coding. After organizing and transcribing the interviews and observations, I read the data several times before developing codes and themes that answered the research question. These emerging themes shaped the development of the focus group questions. Following the focus group discussion, I read the data several times

before developing and categorizing by codes and themes. A hand analysis is suitable

when (a) there is a small database and the researcher is able to easily keep track of files,

(b) the researcher wants to be close to the data, and (c) there is time to conduct a hand

analysis (Creswell, 2012).

**Coding**

After thoroughly reading the data and acquiring an understanding of the data, I

developed some tentative codes or "initial categories of information about the

phenomenon being studied by segmenting information" (Creswell, 2012, p. 424). Data

from the interviews, observations, focus group transcriptions, and field notes were

organized into broad categories selected to address the research questions. I applied the

idea of lean coding and assigned only a few codes so that these can be reduced to "a

smaller number of codes to broad themes rather than work with an unwieldy set of codes"

(Creswell, 2012, p. 244). Lean coding worked best and prevented over coding. This

coding method develops a manageable set of codes which will be aggregated to five to

seven themes and allow more in-depth analysis of teachers' perceptions. Emergent

themes from the one-on-one interviews and observations were used to form the list of

questions for the focus group. Additionally, responses during the focus group were

coded. I relied heavily on direct quotes from participants to offer evidence of the themes

and provide detailed information.

## Research Findings

I presented my findings upon the completion of the data analysis process. In step

c, I continuously analyzed the data to generate descriptions and themes. As I analyzed

and interpreted the information, three major themes emerged. The three emerging themes were (a) implementing balanced literacy to promote reading achievement, (b) teachers' perceptions affected reading outcomes, and (c) challenges to balanced literacy and professional development needs.

Through Step D, I detailed the themes in a qualitative narrative. The narrative conveyed my findings from data collection and analysis that enabled me to answer the study's guiding research question and subquestions in the final narrative report (Creswell, 2012). A part of my findings included direct quotes from the participants, I compared the collected data to determine if and what relationship existed in increasing third-grade students reading achievement and the implementation of balanced literacy. In following Creswell's (2012) data analysis process, in Step E, I interpreted and offered sense of the data.

The data collected from the teachers' interviews, observations, and the focus group discussion answered the following guiding research question and subquestions:

What are the teachers' perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement?

1.  How do teachers define balanced literacy?

2.  How does the balanced literacy framework guide reading instruction?

3.  What literacy components and literacy structures do teachers emphasize?

4.  Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement?

5.  How do teachers perceive balanced literacy to impact student achievement?

**Theme 1: Implementing Balanced Literacy to Promote Reading Achievement**

Data collected from interviews with third-grade teachers attended to the study's guiding research question: What are teacher perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement? The following questions were included in the interview protocol to support the findings for the guiding research question:

Q1: What are your ideas about the teaching of literacy? What principles or philosophies shape your ideas? What is your definition of balanced literacy?

Q3: How have you implemented balanced literacy into your classroom? How does the district's balanced literacy framework guide your reading instruction?

Q4: What balanced literacy components and literacy structures do you use? Are any of these components more critical to literacy development than the other?

Q6: What would you describe as the pros and cons of balanced literacy? What would you identify as the strengths and weaknesses for the district's balanced literacy implementation?

Q7: In utilizing balanced literacy, how do you monitor student learning? What have you noticed about your students' reading achievement?

Q8: Based on your students' reading achievement, what are your perceptions of balanced literacy?

Based on participants' responses, I was able to identify three indicators affecting third-grade students' reading achievement; which were (a) teachers' understanding and delivery of the district's balanced literacy framework; (b) resources and support, and (c)

student learning and achievements. Next, these indicators became the subthemes to which I provided detailed descriptions captured from the participants' views. Based on the teachers' responses, I discovered that the subthemes were indicators teachers perceived to be valuable in increasing third-grade students' reading achievement.

**The balanced literacy framework and its delivery.** Based on the interviews, observations, and focus group discussion, responses to Subquestion 1 showed that all of the participating teachers had unique definitions of balanced literacy and believed that their instructional strategies were aligned to a balanced literacy approach. Overall, the teachers' definitions of balanced literacy included direct and indirect instruction while teaching skills through literature as well as more targeted instruction through isolation. The participants all acknowledged the importance of scaffolding instruction in order to meet the students' individual needs through guided reading (also referred to as small groups), writing, and word study. Essentially balanced literacy refers to an integration of whole-language practices with a phonics basis for reading. The district in the study has a balanced literacy instructional framework and curriculum which follow a constructivist literacy approach which means that instruction is provided on students' ability level. Along with the small group instruction, the balanced literacy instructional framework also applies whole-group reading instruction in order to provide experience with grade-appropriate text. During whole-group reading instruction, the teacher models reading grade-level texts and facilitates the whole group discussion.

The participants in the study provided rich descriptions of their reading instruction, which was provided in response to Interview Question 1. The specifics of

reading strategies as a part of balanced literacy will be further explained through continued analysis. Based on the participants' responses to interview Q3 and Q4, I found that their reading practices were consistent in that teacher participants provided instruction through both whole group and small group formats and teachers taught similar comprehension strategies.

In addition, I learned from teacher participants' answers to interview Q3 and Q4 that during the balanced literacy time period, teachers applied the district's balanced literacy framework to every component of their reading instruction. Teachers also used several balanced literacy resources provided by the district including a "Balanced Literacy Instructional Planning Guide" and units of study. Teachers also noted that the reading coach at each school also provides support with balanced literacy.

During the 2014-2015 school year, school district leaders provided a full-day professional development focused on balanced literacy. As participants responded to interview Q3 and Q6, I was able to interpret that the participants were uncomplimentary about the training. All of the participants felt the training was rushed and too much information was presented in a short period of time. The professional development session introduced teachers to balanced literacy, the district's balanced literacy instructional framework, and district resources to support the implementation of balanced literacy. The participating teachers expressed that they maintained little knowledge from the initial session, but have sought information on their own. Furthermore, the participants reported that the district later released anchor lessons that could be used and serve as a model to guide the development of additional lessons aligned to the balanced

literacy framework. Four of the participants (Participants A, B, D, and E) reported that the units of study and indicated district resources and materials strengthened the district's implementation of balanced literacy and was helpful in guiding their reading instruction. I learned from participants that learning how to implement balanced literacy became a responsibility of the teacher. Each of the participants considered the district's balanced literacy professional development helpful in presenting the framework, goals, timelines, and units of study but did not model practices for implementing balanced literacy.

Three major components of the participants' reading instruction were fluency, vocabulary, and reading comprehension. Teachers expressed that they used units of study in which a specific comprehension strategy was introduced and modeled followed by independent reading when students were expected to apply the strategy. Four of the teachers explained how they presented the comprehension strategies in whole group and followed-up with students during small group instruction. Students were ability grouped in small groups to further reinforce fluency, reading comprehension, and vocabulary skills. There was one teacher in the study (Participant E), who taught gifted students, reported they did very little guided reading instruction.

During the interviews, the third-grade teacher participants described how they used guided reading to provide differentiated instruction to meet the individual needs of the students. In fact, Participant C indicated that effective teaching begins with the teacher being prepared for the lesson. This preparation begins with the development of a mini lesson focus statement that culminates the balanced literacy lesson. During the observations, Participants A, C, and D identified a mini-lesson focus statement or

objective and stated it in a manner that was easily understood by students. For example, Participant C's mini-lesson focus statement was "Readers distinguish between literary and informational text"; however, Participants B and E developed mini-lesson focus statements that were much more complex and not student friendly. Participant B wrote the following mini-lesson focus statement, "Today, the student will learn to differentiate literary and information texts and complete independent reading activities with at least 85% accuracy." All participants had the mini-lesson focus statement written on the board prior to the lesson; however, only Participants A, C, and D communicated the mini-lesson focus statements to students.

Participants A, C, D, and E discussed that preparation included the teacher reading and reviewing the text for guided reading, being familiar with the targeted skills and/or strategies of indicated text, and collecting resources to support students in deciphering meaning of challenging words used in text. Each of the participants believed that providing guided reading groups with scaffold instruction supported students in reading grade level text. Additionally, Participants B and D asserted the importance of maintaining anecdotal notes to guide next instructional plans. During the course of the classroom observations, it was noted that Participants A, B, D, and E recorded anecdotal notes during the lesson while Participant C recorded anecdotal notes as each group finished. The practices observed contributed to the development of grade-level reading. The participants applied various instructional practices, utilized resources and materials to target specific skills based on students' needs, and provided scaffold instruction. From

the observations, the participants demonstrated that they were well-prepared for the lesson.

**Resources and support.** Teachers shared that the following resources were available to support the implementation of balanced literacy: the district's balanced literacy instructional framework, units of study, professional literature, leveled texts, technology resources, time to plan, and instructional coaches to support implementation of balanced literacy. Although these resources were available, the participants reported that content resources were limited.

In 2014-2015, the school district in the study implemented balanced literacy to increase reading achievement among its third-grade students. The district required all English Language Arts teachers to implement the balanced literacy instructional framework and posted it on the district's curriculum and instruction webpage. Units of study that were aligned to the balanced literacy instructional framework were developed and posted to the webpage. District resources were identified to support teachers with instruction. Furthermore, teachers implementing balanced literacy would be able to provide third-grade students differentiated instruction in small group to specifically address individual learning needs while also providing standards-based instruction with grade-level texts in whole group. The district purchased leveled texts for each classroom, and established a literacy resource room in each school to maintain additional leveled texts. With the combination of these curriculum resources, the teachers equipped teachers with appropriate tools to support implementation of balanced literacy.

An additional resource provided was technology. Technology resources included the internet, curriculum online resources, and reading and content software programs. The participants were concerned about the limited number of student laptop devices and classroom computers and considered this limitation a barrier. Other resources included the reading textbook, classroom libraries, school library, and reading resource materials supplied by the district.

Teacher participants further explained that specific school personnel supported them in implementing balanced literacy. This personnel included a reading coach, reading interventionist (where available), technology educator, media specialists, instructional coaches, and administrators. Among all of these resources and support, teachers indicated that their team members were a valuable resource.

**Student learning and achievement.** Researchers have identified two essential points in regards to the teaching and reading from a constructivist approach (Au, 2011; Graves, 2004). The first point in reading is to make meaning of text. This refers to the active role the reader assumes in comprehending and interpreting the text. The second part concerns the subjective nature of the meaning of text, which was dependent on how the reader processes the text. Consequently, the reader's construction of knowledge should not be removed from the social context in which the reading and learning occur. The social and constructive act of learning is evident throughout the balanced literacy framework.

Based on the interviews and focus group discussion, teachers considered student learning and achievement as essential indicators in gauging the effectiveness of

implementing balanced literacy to increase reading achievement of third-grade students. To measure third-grade students' reading development, participating teachers used a variety of informal and formal assessments.

Informal assessments included one-on-one conferences, book talks, teacher observations and anecdotal notes, and independent reading assignments. One-on-one conferences between student and teacher provided extensive information about students' progress in reading and even sustained teachers' efficiency in teaching, reviewing, and reinforcing targeted reading skills. Moreover, Participant C affirmed that conferences were the best way to assess students' reading progress. During the classroom observations, I observed one-on-one conferences with each participant except Participant D. Participants used book talks as a form of an oral assessment. These talks or discussions occurred during guided reading. Participants A, B, D, and E managed the book talks by addressing ideas or questions to specific students and allowing other students to add ideas by following outlined parameters for group discussions. Some participants shared that this form of assessment was not as reliable because certain students seemed to dominate the discussion. Although all participants disclosed that observations and anecdotal notes are a common means of assessing student growth, only Participant B was observed using running records, specifically, to analyze accuracy and document areas where students struggled. In addition, Participant B recorded students' responses to comprehension questions and indicated students' needs with reading comprehension. The independent reading activity came in the form of a written assignment that corresponded with a text. During the observations, Participants B, C, and

D assigned a written assessment as a part of the guided reading lesson whereas Participant A assigned a written assessment based on the text for independent reading. As an example, Participant B met with students in guided reading to determine the central idea in informational text. The written assignment was to determine the central idea of each paragraph of a specified section of the informational text. All of the participants used a form of informal assessments.

Additionally, teachers discussed how they formally assessed students' reading progress. Teachers used assessment forms including unit tests, reading comprehension quizzes, teacher made tests and quizzes, as well as the district's benchmark assessments. Teachers also used quick checks for understanding and exit tickets with five or fewer questions to assess students' mastery of specific skills. Culminating projects and reports were another assessment form mentioned by participants. Participant E exerted that these projects and reports provided students with an opportunity to creatively demonstrate their knowledge. Participants C and D explained how student progress results allowed them to create a list of students needing reinforcement and supplemental instruction. Participant B added that she often reviewed student data, developed instructional notes, and targeted instruction to strategically meet students' diverse learning needs.

Teachers who administer reading support through effective strategies support students' in mastering increasingly difficult text. According to Pressley and Allington (2014), when the teacher focuses instruction at the student's instructional level, balanced literacy can be an effective approach. Scaffolding instruction, according to Boyer (2014), enables teachers to differentiate instruction in order to meet the individual needs of

students at their pace of learning while strengthening student skills and increasing reading proficiency.

Based on the data, the teacher participants perceived balanced literacy to be significant in increasing third-grade students' reading achievement. As I analyzed participants' responses, I was able to interpret several significant indicators which helped the teachers in implementing balanced literacy. Teachers expressed that although the students represented varying reading levels including below grade level, on grade level, and above grade level, demonstrating proficiency with grade level text and comprehension skills seemed unattainable for many students. Implementing balanced literacy and incorporating the instructional practices supported teachers in focusing on essential literacy components and scaffold instruction for the purpose of growing students' zone of proximal development. As shared by Participant B, "Implementing balanced literacy is not a choice, it is simply the way to teach literacy. Our students won't meet the expectations without it." Table 4 presents a summary of teachers' perceptions about the implementation of balanced literacy.

Table 4

*Implementing Balanced Literacy to Promote Reading Achievement*

| Participant | Defining Balanced Literacy | Important Instructional Components | Essential Resources & Support | Student Learning & Achievement |
|---|---|---|---|---|
| A | The blend of direct and small group instruction to meet students' needs in fluency, word analysis, comprehension, and writing | • Direct instruction<br>• Guided reading – targeting needs<br>• Exposure to a variety of texts | • District's balanced literacy framework<br>• Instructional specialists<br>• Units of study<br>• District's professional development | Balanced literacy significantly increased students' reading levels. |
| B | Meeting each students' needs in reading and writing | • Guided reading/small group instruction<br>• Data collection<br>• Assessing students' needs<br>• Scaffold instruction | • District's balanced literacy framework<br>• Online curriculum support<br>• Units of study<br>• Professional development<br>• Team members | Balanced literacy is essential to supporting students in meeting expectations. |

*(table continues)*

| Participant | Defining Balanced Literacy | Important Instructional Components | Essential Resources & Support | Student Learning & Achievement |
|---|---|---|---|---|
| C | A balanced approach to teaching literacy – the connection between reading and writing | • Direct instruction – teacher modeling with grade-level text<br>• Guided reading | • District's balanced literacy framework<br>• Reading coach and team members<br>• Technology resources | After implementing balanced literacy, students at all reading levels have shown large gains in reading levels. |
| D | A balanced approach that focuses on building fluency, vocabulary, and reading comprehension | • Whole group instruction to model skills and strategies<br>• Guided reading – targeting specific skills and scaffold instruction<br>• Data collection through observations and anecdotal notes | • District's balanced literacy framework<br>• District's professional development<br>• Units of study<br>• Online resources | The focus on the need to scaffold instruction has helped my students to grow in reading and increase their zone of proximal development. |
| E | A way of balancing reading and writing instruction | • The connection between reading and writing<br>• Scaffold instruction<br>• Modeling through direct instruction | • District's balanced literacy framework<br>• District's professional development<br>• Units of study<br>• Reading coach, team members, and instructional coach | Balanced literacy has been useful in increasing my students' reading levels. |

**Theme 2: Teachers' Perceptions Affected Reading Outcomes**

The data collected from the interviews and focus group addressed Subquestions 4 and 5: Which components of balanced literacy do teachers perceives as most essential to increasing reading achievement; and How do teachers perceive balanced literacy to impact student achievement. Because teaching and supporting balanced literacy uses a different approach than a traditional reading program, it is important to have teachers who support this research-based approach (Fountas & Pinnel, 2009). Teachers' perceptions of an instructional philosophy influence their behavior and the decisions they make to deliver instructional strategies, engage students, and manage their classrooms (Yanez, 2015). Even though the district has required the implementation of balanced literacy for all elementary reading instruction, it is also important for teachers to buy into this research-based approach. As a result, students are likely to experience greater success at increasing reading achievement. An analysis of teachers' perceptions yielded two significant factors that impact student reading outcomes: (a) ideas and experiences with balanced literacy and (b) balanced literacy components most essential.

**Ideas and experiences with balanced literacy**. Participants considered the district's balanced literacy framework as a helpful resource because it provided a guide for instruction. Additionally, participants shared that as supplemental resources (e.g., the units of study and professional literature) were released, they had a better understanding of the expectations for instruction. Each of the participants valued the implementation of balanced literacy because it aligns with the idea that each child learns differently and has specific reading needs. Participants A, C, D, and E expressed that balanced literacy

allowed the opportunity to provide grade-level standards based instruction and to work in small groups in order to meet the learning needs of students. Four of the five participants agreed that guided reading was the most critical component in order to increase reading achievement. Participant E elaborated that shared reading and read aloud are vital components because these components provide models for students. The other participants agreed with the statement. Participants A and D added that if they had not implemented balanced literacy, it would be difficult to provide grade-level instruction while also addressing the range of reading levels in the classroom. All of the participants indicated that balanced literacy led to positive reading outcomes for students.

Overall, the participants agreed that implementing balanced literacy increased student success in the classroom. Participants A, B, and D shared that they noticed a gain in their students' self-confidence as they were more eager to share in discussions. Participants B, C, and D expressed that balanced literacy allowed students to work to their strengths because students were made aware of their level of performance through the individual conferences that are a part of the independent reading component. During this time, realistic goals were established for students to work towards achieving. All of the participants saw an increase in students' motivation to learn and expressed that balanced literacy facilitated students' ability to work toward their potential and visualize themselves as successful readers.

**Components most essential.** Oftentimes, a teacher's perceptions influence his or her instructional decisions and instructional emphasis (Barnyak & Paquette, 2010). Data collected form teacher interviews, observations, and the focus group discussion addressed

Subquestions 3 and 4: What literacy components and literacy structures do teachers

emphasize?; and Which components of balanced literacy do teachers perceive as most

essential to increasing reading achievement? While all of the participants shared that all

components of balanced literacy are emphasized on a daily basis, the rationale for

including each component differed. Participants A, C, and D emphasized each component

on a daily basis in adhering to the district's balanced literacy framework. Participant B

agreed that she provides instruction in each component and further explained that more

time is allotted for guided reading and the least amount of time is given to read aloud.

Participant E asserted that it's important to emphasize each component because each

component builds upon the other. Based on the participants' responses, I was able to

interpret that in following the district's balanced literacy framework, it is important to

emphasize each component on a daily basis.

     Participating teachers also discussed the balanced literacy component which is

most essential to increasing student reading achievement. Four of the five participants

(Participants A, B, C, and D) shared the belief that guided reading was most essential to

increasing reading achievement. Participants A and D considered guided reading most

essential because students develop reading strategies in this component of balanced

literacy. During the focus group discussion, Participant D elaborated that guided reading

allows her to introduce and develop reading strategies that support her students as they

read increasingly more complex texts. Participants B and C viewed guided reading as

most essential to increasing reading achievement because the guided reading component

provides the opportunity to target students' specific learning needs and strategically build

reading proficiency. In contrast, Participant E stressed that shared reading was most essential to increasing reading achievement because it provides the opportunity for the teacher to explicitly model habits of good readers. Furthermore, during the focus group discussion, Participant E explained that shared reading is when the teacher uses grade level or slightly above grade level text to model various strategies. She added that the constant exposure to complex texts builds strong readers. In response, Participants A, B, C, and D agreed that exposure to grade level texts is important, but guided reading is the component that equips students with the skills necessary to be successful readers who experience increased reading achievement. Based on participants' responses, I was able to interpret that the majority of participants perceived guided reading to be most essential to increasing reading achievement. Table 5 provides a summary of teacher perceptions about the components of balanced literacy and the effects balanced literacy has had on their third-grade students.

Table 5

*Teacher Perceptions about Balanced Literacy and Reading Outcomes*

| Participant | Components and Structures Emphasized | Component that is Most Essential | How Teachers Feel about Balanced Literacy | Effect of Balanced Literacy on Student Reading Outcomes |
|---|---|---|---|---|
| A | Following the district's balanced literacy framework, all components must be addressed each day. | Guided reading – This is the component that builds students' reading repertoire with useful strategies and leads to increased reading achievement. | An effective approach that allows me to address grade-level standards while also meeting students' individual needs. | Not only has the students' reading levels increased, but their confidence levels have increased. |
| B | I provide instruction in each of the components. More time is allotted for guided reading. The least amount of time is given to read aloud. | Guided reading – It's that opportunity to meet individual students' or a group of students specific learning needs. | With balanced literacy, it seems that students are more motivated to learn. | My students are more willing and excited to share in whole and small group discussions. The reading levels are really soaring. |

*(table continues)*

| Participant | Components and Structures Emphasized | Component that is Most Essential | How Teachers Feel about Balanced Literacy | Effect of Balanced Literacy on Student Reading Outcomes |
|---|---|---|---|---|
| C | We are responsible for providing instruction in each of the components on a daily basis…following the framework, more time is designated to guided reading followed by independent reading. | Guided reading – I have the opportunity to provide focused instruction for students and respond to data by meeting learning needs. | This framework recognizes the relevance of small group instruction in order to better prepare students for on-grade level tasks. | The students are more confident and can see and understand their reading successes.  They work harder towards achieving reading goals. |
| D | We are held accountable for providing instruction in each of the components every day.  Our schedule must align with the district's balanced literacy framework. | Guided reading – Students are able to develop the skills they need to become stronger readers.  They then visualize themselves as good readers. | Without the practices of balanced literacy, it would be extremely difficult to meet students at their level and provide grade level instruction too. | Students' reading levels have grown significantly which has improved their self-confidence. |
| E | All components are essential to instruction because each builds on the next and supports the other. | Shared reading – It allows the teacher to explicitly model habits of good readers. | I like that it's a research based approach that considers strategies to meet grade-level expectations and strengthen students based on their learning needs. | The students have experienced greater reading and writing benchmarks. They are seeing themselves as growing readers and writers. |

**Theme 3: Challenges to Balanced Literacy and Professional Development Needs**

Data collected from interviews with teachers, classroom observations, and the focus group discussion provided responses for the study's guiding research question: What are teachers' perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement? In uncovering teachers' perceptions and probing for a deeper explanation, I was able to ascertain the challenges teachers encountered in implementing balanced literacy and interpret the professional development needs. Based on participants' responses, I was able to analyze that there were several challenges and professional development needs affecting the implementation of balanced literacy. Overall, each of the participants believed that professional development was important to their effectiveness in implementing balanced literacy and the increased reading achievement of their students.

**Challenges to balanced literacy**. Through questioning and probing, participants provided thorough explanations of the challenges they experienced in implementing balanced literacy. All of the participants were able to identify a positive aspect of balanced literacy. Participant A appreciated that they were implementing research-based practices while Participant B liked that balanced literacy considered students' individual needs. Participants C, D, and E each highlighted other benefits of balanced literacy, Participant C considered it a positive aspect of balanced literacy that the learning is student-centered and students are held accountable to be active learners. Participant D stated that the effective use of direct instruction and student application were positive aspects of balanced literacy, while Participant E identified the authentic reading and

writing experiences as a positive aspect. Although participants were able to identify various benefits they experienced since implementing balanced literacy, the participating teachers were consistent in describing the challenges faced since the implementation of balanced literacy. I compiled a list of challenges, shared by the participants, which hindered the effective implementation of balanced literacy. Participants all expressed that the time invested in planning and preparing balanced literacy lessons was overwhelming. Participant B stated, "I spend a lot of time for preparation. It can be exhausting." Furthermore, participants agreed that an extensive amount of time was spent developing differentiated lessons for small groups. After probing for an estimated amount of time devoted to planning, participants concluded that they were spending about five hours each week planning for balanced literacy alone. Prior to the implementation of balanced literacy, according to the teachers, they invested two hours on average. Participant E shared, "It takes time to strategically provide differentiated learning experiences for all of your students." Collaboration with other teachers and support personnel was a helpful tool, the opportunity to collaborate was not equitably available. Participant C did not find time to collaborate because of professional responsibilities and Participant D, being in a small school setting, did not have colleagues to collaborate. For the participants who collaborated with colleagues on the implementation of balanced literacy (Participants B and E), both participants expressed that collaboration was helpful. In analyzing the challenges participants encountered in implementing balanced literacy, it led to a discussion of recommendations for improving the program through professional development.

**Professional development needs.** A compilation of the data and further analysis of professional development needs yielded specific training as requested by participants. Overall, participating teachers perceived the district's professional development helpful in providing an overview of balanced literacy and its components, the units of study, and professional literature. However, the participants viewed the professional development did not model practices for (a) developing and implementing instruction for all components of balanced literacy, (b) assessing student performance in all components of balanced literacy, and (c) addressing the needs of students with varied reading abilities. Participants B, C, and D reported that additional training is needed with balanced literacy in general. Further analysis revealed that training is needed in planning balanced literacy lessons and understanding how effective implementation looks. Moreover, Participants A and E requested training in developing assessments for balanced literacy. Based on the data, all of the participants agreed that more training in balanced literacy is necessary to ensure its effective implementation. The analysis of professional development needs provided a vision for the need for teachers to acquire pedagogical instructional knowledge and skills in balanced literacy. Table 6 presents a summary of the challenges participating teachers experienced and the professional development needs.

Table 6

*Challenges and Professional Development Needs*

| Participant | Pros and Cons of Balanced Literacy | Planning and Preparation | Collaboration | Professional Development |
|---|---|---|---|---|
| A | Pro: It's research-based.<br><br>Con: There is a lot of material to cover. | An abundance of time is invested in preparing lessons and planning for small groups. | I feel like I'm doing everything by myself without much guidance. I could benefit from the support through collaboration. | Understanding how to assess all components of balanced literacy |
| B | Pro: This approach takes into account the idea that children have individual needs.<br><br>Con: Everyone seems to have a different idea about balanced literacy. | I spend a lot of time for preparation. It can be exhausting. | At the beginning of the year, we developed a schedule to collaborate as a grade level and plan for literacy instruction, but we have not collaborated lately. | I need more training with several of the components. Model lessons on these components would be helpful. |

*(table continues)*

| Participant | Pros and Cons of Balanced Literacy | Planning and Preparation | Collaboration | Professional Development |
|---|---|---|---|---|
| C | Pro: The learning is student-centered and students are active participants in the learning process.<br><br>Con: While it is student-centered, some readers benefit from more explicit instruction with on-grade text. Unfortunately, there is less time for this with balanced literacy. | Planning isn't easy. Perhaps I need to figure out a more effective process. | With all of our other responsibilities, it is almost impossible to collaborate. | The district should focus on more training with balanced literacy and providing the opportunity to collaborate with other teachers and discuss differentiation practices. |
| D | Pro: Balanced literacy makes effective use of direct instruction and application of skills and strategies.<br><br>Con: Extremely time consuming | The development of differentiated lessons and activities require an abundance of time and creativity. Additional time is spent reviewing data. | In my small school setting, there is no one on my grade level to collaborate. | I could benefit from more training so that I can improve my balanced literacy practices. |

*(table continues)*

| Participant | Pros and Cons of Balanced Literacy | Planning and Preparation | Collaboration | Professional Development |
|---|---|---|---|---|
| E | Pro: It provides authentic reading writing experiences.<br><br>Con: Balanced literacy requires intensive, purposeful planning by teachers. | It takes time to strategically provide differentiated learning experiences for all of your students. | Working with my colleagues was extremely beneficial. We need more time to collaborate in order to better implement balanced literacy as a district. | I would like some training in developing varied and differentiated assessments for balanced literacy. |

**Evidence of Quality**

**Validity.** Throughout the data analysis process, it was essential for me as the researcher to validate findings. Qualitative validity is to be determined through the use of strategies to check the accuracy of the findings. According to Yin (2009), the application of three main guidelines can prevent problems with validity and reliability. These principles are using many pieces of evidence, developing a database, and maintaining the evidence. By applying these guidelines, problems with validity and reliability can be avoided (Yin, 2009).

It was also critical that the case study report provide sufficient evidence that supports the formation of conclusions. Raw data is always accessible for review and thus stored in a locked filing cabinet. This measure served to increase the reliability of the case study (Yin, 2009). Additionally, I created, gathered, and maintained all evidence from the beginning of the study through findings reporting. Again, these measures were in place to increase the reliability and improve the development of the validity of the case study (Yin, 2009).

Data are often validated by triangulating the data from varied sources (Creswell, 2012; Yin, 2009). Using several types of evidence enables triangulation of the data. Furthermore, the use of multiple data sources permits converging lines of inquiry which is described as a major strength of case studies (Yin, 2009). There are four types of triangulation: (a) data triangulation, (b) investigation triangulation, (c) methodological triangulation, and (d) theory triangulation. With this case study, the data collection was focused on data triangulation. It was my goal to triangulate the data by supporting facts and findings with several sources of evidence.

**Triangulation.** Triangulation is an approach to check the integrity of the inferences and can involve the use of multiple data sources, multiple investigators, multiple theoretical perspectives, and/or multiple methods. In this study, data will be triangulated by using multiple forms through the use of interviews, observations, and a focus group. The use of multiple sources of data will enable me to validate the data and check the findings against the sources to test for consistency. Therefore, the data can be corroborated. Additionally, transcripts from interviews, observation, and the focus group will be recorded and member checking will be used. The participants for the interviews will also be the participants for the observations and focus group discussion. Protocols will be in place to support participant involvement and maintain credible interview, observation, and focus group discussion processes. I will be the only person collecting the data, and it is pertinent that the data collecting and analyzing processes be consistent. I continued the analysis process from initial coding to more elaborate codes and linkages and until theoretical saturation was achieved in order to increase the quality of the

findings that emerged. This is when no new themes or issues arose regarding a category of data and when the categories were well established and validated. Lastly, an audit trail was utilized so that information could be linked to its original source and established the trustworthiness and thus credibility. Triangulation of the data was in place to balance and strengthen the findings (Altrichter, Feldman, Posch, & Somekh, 2008). The primary data source was the interviews, while the observations and focus group served as additional data sources. This strategy confirmed "the study will be accurate because the information draws on multiple sources" (Creswell, 2012, p. 259). Together, these steps ensured dependability.

Trustworthiness was determined by credibility, transferability, dependability, and confirmability (Lodico et al., 2010). To initially establish trustworthiness, I used audio recordings to capture the responses of participants while limiting distractions from note-taking and capturing opportunities to probe and elaborate. Furthermore, the researcher's notes were used to record participants' responses and nonverbal cues.

**Credibility.** Credibility is when the researcher analyzes the data through a process of reflecting, sifting, exploring, judging its relevance and meaning and ultimately developing themes and essences that accurately depict the experience (Creswell, 2012). Credibility measures included me stating and addressing my biases. Because of my belief in and support of the balanced literacy approach, I held an interest in obtaining positive findings. I adhered to all ethical guidelines and demonstrated appropriate conduct throughout the research process by limiting researcher's bias. Other credibility measures included member checking in which the teacher participants reviewed the interview,

observation, and focus group data for accuracy of the information within 72 hours of each collection method. Transcriptions were emailed to participants for review. If changes were needed, participants were asked to submit revisions with 48 hours after review. Research findings were validated through triangulation.

Dependability was established with the audit trail which included maintaining and preserving all transcripts, notes, and audiotapes. Dependability was also established through my description of the data collection, analysis, and interpretation audio recorded interviews, and having data available for review. Transferability was provided through the thick, rich descriptions (Lodico et al., 2010). Lastly, validity of the study was strengthened when common themes surface through the coding of the data from the interviews and focus group discussions.

## Limitations

The results of the study could present the opportunity for social change in instructional literacy, but there are foreseen limitations. The main limitation is the small sample size. The study includes only eight participants who represent only three schools within the same district. A study that examines the perceptions of third-grade teachers across the district or state could provide a broader outlook on the state's reading instructional needs with regard to balanced literacy. Future studies would benefit from a larger sample size.

In light of these limitations, the findings should be considered as suggestive rather than conclusive. Further research should address these limitations and replicate the results of the study to increase external validity and generalizability.

**Conclusion**

The purpose of the study was to examine third-grade teachers' perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement. A qualitative case study was applied so that I could obtain detailed examinations through interviews, observations, and a focus group. I focused on establishing a rich, thorough understanding of the balanced literacy approach so that teachers could apply this approach to build students' reading achievement. The findings enabled me to establish professional development based on the balanced literacy approach.

Section 3: The Project

## Introduction

The findings from Section 2 indicated that teachers wanted a model of how to implement (pedagogy) the balanced literacy framework. The proposed project is a balanced literacy professional development to support the district's implementation of balanced literacy. This professional development is designed to enhance third-grade teachers' content and pedagogical knowledge and skills by incorporating best practices for training adults and for implementing balanced literacy. The purpose of the balanced literacy professional development project is to (a) educate teachers on constructivist educational practices and (b) model practices for implementing each component of the balanced literacy framework.

In Section 3, I provide a brief synopsis of the proposed professional development project, the goals of the project, and the rationale for choosing the project. Next, I present the literature review about the project. Additionally, I provide explicit details about the project.to include resources needed, implementation process, tentative time schedule, and the roles of participants. In the first section, I outline the plan for evaluating the professional development project, justification, evaluation goals, and implications.

## Description and Goals

The goals of the professional development model are to provide third-grade teachers with the knowledge and skills for teaching reading following the district's balanced literacy framework as participants indicated that additional training was needed with implementing the balanced literacy framework. In the one-on-one interviews as well

as the focus group discussion, each of the participants expressed that they needed additional training in order to be more effective with balanced literacy. Participants requested additional training and support in fully understanding the components of balanced literacy, providing differentiated instruction, developing assessments for each of the components, and demonstrating model lessons. The professional development will provide third-grade teachers structures that are research driven and aligned to the balanced literacy framework to incorporate in their daily teaching practices.

**Rationale**

The project was developed in response to the research participants who indicated a need to increase their understanding and implementation of balanced literacy, an instructional framework applied to increase third-grade students reading achievement. The participants shared that the professional development focused on balanced literacy was helpful because of its structure, the format for implementing balanced literacy, and the resources to support implementing balanced literacy. Furthermore, the teacher participants stated that the instructional coaches currently provided school-based training and support on balanced literacy and monitored teacher practices as well as students' progress and growth. Teachers expressed a need for more in-depth training on the balanced literacy instructional framework.

Interview and focus group data uncovered that teachers consistently expressed the need for a model in implementing the balanced literacy framework and effective teaching practices to support the framework. The balanced literacy professional development will support teachers implementing balanced literacy in order to support increasing the

reading achievement of third-grade students. In order to enhance third-grade teachers'

knowledge and skills in implementing balanced literacy, the balanced literacy

professional development must be "purposefully conceptualized, thoughtfully

implemented, and meaningfully employed" (Loughran, 2014, p. 280). Additionally,

administrators can benefit from the consistency of having a systematic structure in place

when monitoring what characteristics are essential to all reading instruction that follows

the district's balanced literacy framework.

Moreover, teacher participants communicated a need for professional

development that provided an in-depth understanding of the components of balanced

literacy, modeled lessons, strategies to differentiate instruction, and opportunities to

develop assessments for balanced literacy. These are all critical aspects to effectively

implement balanced literacy and will support teachers in increasing reading achievement

among third students. Because of the intensive work and high demand on time for

teachers to develop their balanced literacy practices (DuFour & Reeves, 2015; Malik &

Malik, 2011), recommendations will need to include future plans for on-going

comprehensive professional development to support teachers in increasing student

reading achievement.

### Review of Literature

This review of literature provides a thorough collection of studies that illuminated

the benefits effective professional development has on improving teacher quality and

student learning experiences. The literature on professional development provided

compelling information on what constitutes quality or effective professional development

that will provide the third-grade teachers within this study district with enhanced knowledge and skills to implement balanced literacy. The review of literature has been organized into three sections. In the first section, I have reviewed current literature on adult learning and professional learning. Next, the second section is a review of professional development within an educational setting. Lastly, in the third section, I present professional development in regards to constructivist practices and balanced literacy.

With regard to the project study, the online literacy accessible through Walden University's library website provided sources from the educational databases including ERIC, Education Research Complete, ProQuest, and Education from SAGE and Thoreau. The search was initiated using the keywords *professional development, balanced literacy, effective practices, best practices, reading instruction,* and *constructivist teaching.*

**Relationship Between Adult Learning and Professional Learning**

In an attempt to provide purposeful professional development for implementing new programs and initiatives, it is essential to understand the learning needs of adults. I used Knowles's adult learning theory, known as *the andragogical process model*, a method that is collaborative and problem-based (Knowles, Holton, & Swanson, 2011). In the case of applying the andragogical process, the presenter serves as the model to this professional development and provides the learner with procedures and resources to develop the knowledge and ability to effectively implement the balanced literacy framework. The andragogical process model consists of eight elements:

a) preparing the learner; (b) establishing a climate conducive to learning; (c) creating a mechanism for mutual planning; (d) diagnosing the needs for learning; (e) formulating program objectives that will satisfy these needs; (f) designing a pattern of learning experiences; (g) conducting these learning experiences with suitable techniques and materials; and (h) evaluating the learning outcomes and rediagnosing learning needs (Knowles et al., 2011, p. 114).

Beavers (2009) considered the unique ways adults learn, their variety of experiences, and predefined ideas of what adults perceive that they need to learn in advocating for professional development that embraces active involvement and reflection. It is essential to acknowledge and respect the varied needs of teachers and how a teacher's experience in a classroom setting is unique. Thus, transitioning teachers to a new program such as balanced literacy as in the project study can be achieved by incorporating particular adult education principles that are advocated by Knowles's adult learning theory.

Discussing the significance of adult learning is necessary for understanding what teachers in the balanced literacy professional development will need in order to foster sustainable habits and instructional practices. Bell and Gilbert (as cited by David, 2013) reported numerous studies on professional development; however, there are multiple concerns over the gaps in literature. These concerns involve the basis of teacher development and the frustration teachers experience seeking change. According to Beswick (2014), professional learning developers have spent little effort determining teachers' needs and the effectiveness of their efforts in gathering teachers' needs or

propelling professional learning. Furthermore, Beswick advised the professional learning developers to seek first to establish a climate of trust, which can be accomplished by gathering teachers' input in the professional learning process and asking their needs and listing strategies to address the needs.

In analyzing adult learning, it is effective to show the relationship concerning professionals in professional learning communities (PLCs). Webster-Wright (2009) argued that although research supported changes about how professionals learn, "many professional development practices still focus on delivering content rather than enhancing learning" (p. 702). Research has indicated that professionals learn from a varying range of activities, formal professional development, collaborating with peers, and a combination of experiences (Lipp, 2013; Schawbel, 2013; Webster-Wright, 2009).

**Professional Development**

The effectiveness of professional development could be measured by its impact in the classroom (Deal, Jenkins, Deal, & Byra, 2010; Harris, 2014; Hirsh, 2015). Some trainings in the teaching profession are still driven by a business mindset that emphasizes profits over results, which may not fully relate to the school's local issues. In previous studies, upon returning to school, teachers have lost the enthusiasm and invigorated energy that was built by external consultants during professional development (Harris, 2014). Professional development for teachers should allow them to share common interests and goals while focusing on improving student reading achievement.

There have been arguments regarding the implicit assumptions of professional learning and research (Webster-Wright, 2009). One assumption is that well-designed

professional development along with good facilitators will yield positive changes in practice. Another assumption is that knowledge is transferred to the practitioners' minds and presented in practice, and therefore the learning can be required through attendance or engagement in the training. However, there is a concern of the weak understanding regarding continuous professional learning and how professionals learn in the workplace. Webster-Wright (2009) cautioned that assumptions of this nature have produced challenges, limited critical inquiry, and propagated the status quo.

Often, current professional development has overlooked implications of both context and ontology in learning, Webster-Wright (2009) shared that researchers have argued for a shift in the conceptualization and practice from development to learning through authentic professional learning. Most professionals are self-reflective and want to improve their practice, which means those in administrative roles need to be supportive during the learning process and focus less on autonomic control, stifling learning, and standardizing professional learning experiences (Webster-Wright, 2009).

In moving forward, the relationship found between adult learning and professional learning is that both require active learning centered on the needs of the teacher, as the learner. Teachers' beliefs and perceptions must be considered in that how they think about what is done in their classes is just as significant as what they should be doing (Kim, Erekson, Bunton, & Patricia, 2014). Research on adult learning and professional learning in the work environment provided insight of practices to use with balanced literacy professional development project that can engage teachers in learning

and sustaining practices, which may result in positive reading achievement for third-grade students.

**Professional Development and Education**

Educating 21$^{st}$ century learners requires schools to actively employ and train highly skilled and knowledgeable classroom teachers. Teacher quality is a significant factor contributing to student achievement and education improvement (Cochran-Smith, as cited in Carpenter & Sherretz, 2012). From a global perspective, professional development has been utilized as a means of improving and strengthening teaching practices in order to promote and enhance student learning (Akiba, 2012; Carrejo & Reinhartz, 2012). In the United States, national, state, and local governments actively support teacher professional development. As international research in teacher professional development has continuously grown, Petrie and McGee (2012) acknowledged that it "has resulted in guidelines to support developers and deliverers of professional development to understand what constitutes effective professional development approaches that are likely to lead to improvements in teacher and school practice" (p. 59).

From a global perspective, one of the primary reasons schools in some countries demonstrated high student performance was professional development. In an educational brief reported by the Alliance for Excellent Education and the Stanford Center for Opportunity Policy in Education, Rothman and Darling-Hammond (2011) stated that Finland, Ontario, and Singapore had among the highest performing educational systems according to results on an international tests of student achievement. Some factors that

were attributed to the educational systems' success included preparation, recruitment,

induction, professional development, career development, and retention (Rothman &

Darling-Hammond, 2011; Schawbel, 2013).

Undoubtedly, there is a need to define what distinguishes effective and

meaningful professional development. To begin, effective professional development is

defined as "that which results in improvements in teachers' knowledge and instructional

practices, as well as improved student learning outcomes" (Wei, Darling-Hammond,

Andree, Richardson, & Orphanos, 2009, p. 3). Wei et al. (2009) provided the definition in

a comprehensive technical report to inform stakeholders of teacher development

research-based structures, which have proven to have positive effects in student

achievement (Wei et al., 2009). Additionally, the authors provided some evidence-based

studies to communicate a clear and concise message that high quality professional

development "focuses on enhancing teachers' knowledge of how to engage in specific

pedagogical skills and how to teach specific kinds of content to learners" (Wei et al.,

2009, p. 61).

In a technical support published by the National Staff Development Council

(NSDC) in 2001, three standards were constantly emphasized, which served as the

guiding force in teacher growth and development (Wei et al., 2009). Several schools in

the United States and international schools that experienced success had used the NSDC

2001 standards. The first standard, known as context standards, focused on strong

leadership, adult learning, and collaboration. Process standards, the second standard,

include student data that shapes the teacher learning, the use of multiple evaluations to

assess learning, research-based decision-making, design, learning by applying knowledge, and training teachers in the collaborative process (Wei et al., 2009). The third standard included the content standards of equity, quality teaching, and family involvement (Wei et al., 2009). By enhancing the standards promoted by the educational experts in the technical report, the balanced literacy professional development in the project study has the potential to enhance teacher capacity and promote positive changes in teaching practices that will support both teachers and student.

Each year, public schools allocate vast amounts of money training teachers in effective practices in order to achieve the common goal of increasing student achievement. Much of the funding is provided by the federal government to help schools meet accountability measures. To advance quality staff development, schools should seek and develop professional learning demonstrate that is aligned with the standards of the NSDC. According to the "Quality Counts" report, in the 2009-2010 school year, 40 states developed recognized professional development standards (Editorial Projects in Education, 2011), and, of the 40 states, only 24 states financed professional development for all districts in the state (Wei et al., 2009). Studies involving the use of standards for staff development provided relevant information regarding the effects of professional development in the education setting.

In one study, alarming results relating to the effects of professional development practices were uncovered. In one of the largest and most inclusive synthesis of professional development analysis reported by Guskey and Yoon (2009) led to the discovery that only nine elementary schools experiencing positive effects and met the

standards established by What Works Clearinghouse (WWC). Researchers from the American Institute for Research analyzed 1,343 studies, including elementary, middle, and high schools, that addressed the effects of professional development and student learning outcomes. The nine studies were conducted between 1986 and 2006. Between 1986 and 2003, no middle or high schools met the standards and between 2004 and 2006 no schools met the standards (Guskey & Yoon, 2009).

Guskey and Yoon (2009) reported that rigorous and scientific investigations provided evidence to explain why the nine elementary schools met the standards established by WWC. Some of the nine elementary schools organized workshops centered on research-based instructional practices. The participants were engaged in active-learning and had the flexibility to adapt the practices in their classrooms. With some schools, school improvement stemmed from using external consultants to provide professional development. Additionally, time for educators to engage in high-quality professional development was significant even though the amount of time varied between the schools. Overall, it was found that schools investing 30 or more hours in professional development experienced achievement.

Additionally, Guskey and Yoon (2009) strongly acknowledged that the study findings do not necessarily indicate that alternate training methods were ineffective. The strategies reviewed were scientifically proven to be effective; however, the professional development strategies were not impeccable and varied in quality and effect. Guskey and Yoon concluded, "The amount of valid and scientifically defensible evidence we currently have on the relationship between professional development and improvements

in student learning is exceptionally modest" (p. 499). The significance of the study is that it provides valuable information to consider in the development of a balanced literacy professional development as a part of the project study.

**PLCs**

PLCs are self-directing collaborative teams that includes teachers on similar grade levels or content areas. The goal of PLCs is to improve instruction in order to increase student achievement (Akiba, 2012; Harris, 2014). Members of PLCs are a part of one or more than one group dependent on their time and availability. The characteristics of effective PLC teams can take on various forms ranging from collective inquiry about specifics in the curriculum, innovative instructional practices, interventions to address students' needs, and the development and analysis of purposeful assessments (Harris, 2014). Being a member of an effective PLC should be an ongoing process, cyclical in makeup, and operating towards a common goal with clearly defined group norms (Annenberg Institute for School Reform, 2004). Shared responsibility and ownership of the learning outcomes for students should be equally distributed among all team members.

Being a member of a PLC team presents the opportunity for teachers to collaborate with colleagues regarding specific needs such as instructional strategies, lesson plans, and assessments. Teachers are able to readily apply the ideas and practices in their classrooms and reflect on the results with team members. PLCs provide the opportunity for teachers to develop innovative strategies to support struggling learners as well as enrich the education of students mastering learning targets (DuFour & Reeves,

2015). This ongoing, collaborative practice can be an effective and efficient means of promoting current teaching practices (Provenzano, 2014; Schawbel, 2013; Schmaker, 2006).

Teachers are able to learn from one another by partaking in PLC teams and dedicating time for collaboration (Marzano, Boogren, Heflebower, Kanold-McIntyre, & Pickering, 2012; Wei et al., 2009). Members who participate in structured and continuous practices within PLCs are more likely to develop enhanced instructional strategies (DuFour, DuFour, & Eaker, 2006). It is important to consider that PLCs can only be as effective as their members and that improvements are made through continuous and ongoing PLCs. As teachers collaborate to enhance instructional strategies, they are able to differentiate lessons in response to the specific learning needs and culture of the school setting. The collaborative process evident in PLCs could be a significant contributing factor in increasing student reading achievement (Akiba, 2012; DuFour et al., 2006; Protheroe, 2008).

PLCs are considered job-embedded professional development, which means they provide on the job training and knowledge for teachers. In a typical PLC, members will collaboratively review and discuss instructional practices, assessments, and student data; produce new practices; implement the practices; analyze the effectiveness of the practices; and examine the results in proceeding PLCs. Effective PLC teams assist the members to decipher the information and present feedback in order to improve instructional practices. The cycle continues as teachers implement the suggestions and improved practices in the classroom (Croft, Coggshall, Dolan, Powers, & Killion, 2010;

Marzano et al., 2012; Provenzano, 2014). An advantage of this job-embedded

professional development is that it enables teachers to differentiate instruction to target

learning needs and respond to local issues (Annenberg Institute for School Reform, 2004;

Dixon, Yssel, McConnell, & Hardin, 2014)

   Other characteristics of effective PLC teams are distinct formats and clear,

common goals. These teams are not simply a gathering of educators randomly discussing

school issues. Instead, PLC teams are data-driven action teams that are focused on

developing more effective practices in order to increase student achievement. Initially,

PLC teams should establish group norms and establish respect and trust among all group

members. All group members should have the opportunity to contribute to the

development of the group norms (DuFour et al., 2006). Establishing the group norms

allows each team member to know what to expect, how to contribute, and how to keep

the session flowing (DuFour et al., 2006; Pentland, 2012). This process could begin by

reflecting on past experiences and reviewing factors that contributed to successes as well

as obstacles that inhibited the effectiveness (DuFour et al., 2006; Marzano et al., 2012).

Some probable responses might be in relation to respecting the importance of the meeting

by being on time, being present throughout the entire meeting, focusing on the meeting

and not multitasking, and giving members equal opportunity to be heard during

discussions (DuFour, DuFour, Eaker, & Many, 2010). It is helpful to discuss what to do

when group norms are not in place or are violated (DuFour et al., 2006). At the end of

PLC session, all members should have at least one strategy to implement in the

classroom.

Overall, PLCs have the potential to facilitate the development of learners and instructional leaders in a professional setting who have committed to the common goal of increasing student achievement (Little, 2006). New collaborative instructional strategies can materialize and bring about increased student achievement when schools take on the PLC model (Annenberg Institute for School Reform, 2004; Dixon et al., 2014). Both supportive and shared leadership can inspire teachers independently and as a group or staff to develop leadership roles within the larger school community (Annenberg Institute for School Reform, 2004; Gratton & Erickson, 2007). The strain of the increased expectations for teachers to act as statisticians, assessment analysts, and diagnosticians, while also understanding the demands of teacher value-added evaluations, state standards, and state mandated testing can have an overwhelming effect (Senge, 2006). The complexity of these shifting expectations has tested teachers' efficacy.

Belonging to a PLC team supports collaboration among colleagues and enables teachers to assist one another. PLCs not only provide the time for colleagues to work together but also provide focused efforts on student achievement. Through PLCs, teachers are able to strengthen their teaching practices, enhance lessons, and increase student achievement (Senge, 2006). The PLC approach of professional development can also facilitate the distribution of leadership responsibilities by giving teachers the opportunity to be a part of the school's decision-making process (Seashore-Louis et al., 2010). Schools with effective PLCs can experience multiple benefits including improved staff morale and enthusiasm in the work environment (Annenberg Institute for School Reform, 2004). Collaboration is strengthened by a common goal and shared belief that all

children can achieve. Little (2006) suggested that all PLC team members be involved in developing lessons, actively participating in research, designing and implementing assessments, reflecting on data and results, and even scheduling sessions. Sustainability of the professional development, regularly scheduled sessions, and meeting in a timely manner is essential to the effectiveness of the professional development. It is imperative not to allow too much time to lapse between implementation and assessment of new teaching strategies. Having reflective discussions is important to future PLCs in order to analyze and enhance modifications of lessons in order to increase student achievement (Mintzberg, Lambel, & Ahlstrans, 2005).

The commitment to establishing effective PLC teams can be extremely complex. Trust between and among team members must be nurtured to develop a comfort level when discussing strategies and skills. Taking the time to establish the rules and expectations of PLC teams can lead to better decisions and the accomplishment of targeted goals (DuFour et al., 2010; Lencioni, 2007; Pentland, 2012). Teachers belonging to effective PLC teams are able to assume various roles and support leadership distribution within the school (Seashore-Louis et al., 2010). This shared leadership can enhance teaching practices and instructional strategies across the school. Effective PLCs are able to achieve the goal of improving instruction and increasing student achievement.

**Theoretical Framework**

This project was developed with adult learners, specifically attending to teachers. The understanding of how adults learn can contribute to the success of the professional development. The theoretical framework applied the theories of Knowles (as cited in

Knowles et al., 2015) and Vella (2002) to the PLCs. These theories clarify the motivation

inherent in adult learning. The common principles among these theories include the

relevance and immediate application of training, the intrinsically motivated

characteristics of the learners, and the active participation of all participants in the

professional development. These theories are aligned to the PLC model of professional

development (Knowles et al., 2015; Seashore-Louis et al., 2010).

Effective PLCs cannot be a mandated professional development by an

administrator. Instead, it is a self-driven professional development and is based upon the

value a teacher places on an effective team by producing results and the willingness of

their dedication. If it is not created and maintained by the members, it is not a PLC. Some

school administrators have tried to establish small, grade level professional development

sessions and consider these to be PLCs, but by definition, these are not PLCs. Rather,

these are grade level meetings without administrators' presence. PLCs are effective

because the team members are integral to creating and sustaining it. It is beneficial for the

members of effective PLCs to be self-driven, dedicated to their roles and responsibilities,

use professional courtesy by following rules and group norms, and believe in the PLC

model to produce sustainable and useful professional development (DuFour et al,., 2010;

Knowles et al., 2015).

**Knowles, Vella, and adult learners.** Knowles (as cited in Knowles et al., 2015)

claimed that educators of adult learners must be facilitators of their learning by

establishing goals and guiding the learning so that the goals are achieved. Knowles's (as

cited in Knowles et al., 2015) assumptions about adult learners included the desire of the

learners to know why a concept is necessary to learn. Adult learners are self-directed, have rich background knowledge developed through experiences, have a need to readily apply new information, and are motivated to learn if they see that the information is relevant to their lives (Knowles et al., 2015).

Vella (2002) contributed specific guidelines for teachers. Vella's emphasis was on the dialogue shared in professional development opportunities and the key principles necessary for professional development to be effective. The participating learners should complete a needs assessment survey or questionnaire; the information for this project was qualified through in-depth interviews and observations supplemented by a focus group discussion.

When planning PLC team sessions for adult learners, all of the members must be actively involved in the decision-making process, placing trust in the other members when sharing information and having trust in the competency of the session leaders (Knowles et al., 2015). Members of the PLC teams must be able to work collaboratively as well as independently. Team member also must assume different roles for the sessions to be productive. Lastly, in topics for each session should be achievable in one 45-minute session and be immediately applicable in the classroom (Vella, 2002).

**Classroom Instruction, Curriculum, Balanced Literacy, and Assessments**

Classroom instruction is guided by state standards and data that drives the instructional needs of students. The South Carolina College and Career Ready Standards (SCCCRS) are not a curriculum, rather, it defines the requirements to be mastered at each grade level (South Carolina Department of Education, 2015). The reading curriculum and

balanced literacy framework utilized by the district are comprehensive and are not derived from a teacher's manual. For grades three through five, there is an explicit set of standards that students must master in reading and writing along with suggested units of study and pacing.

Balanced literacy is an approach that emphasizes children's choice of texts, independent reading, and group discussions for reading instruction in the elementary grades (Heitin, 2014; Taylor & Duke, 2013). The balanced literacy framework is implemented through seamless delivery of instruction across the components of read aloud, word study, shared reading, guided reading, independent reading, and writing (Marshall, 2015). It is highly structured and includes opportunities for teachers to provide interventions and/or enrichment based on students' needs. Balanced literacy is an instructional practice that is widely applied in order to improve student reading achievement and have far reaching classroom implications (Bitter et al., 2009; Heitin, 2014; Pressley & Allington, 2014; Taylor & Duke, 2013). The state assessment is aligned is aligned to the South Carolina College and Career Ready State Standards and measures students' content knowledge and skills specific to grade-level standards (South Carolina Department of Education, 2015). Students must be able to demonstrate proficiency in reading grade level texts independently and apply skills in reading comprehension, vocabulary analysis, and writing; all areas which are developed with balanced literacy.

## Implementation

The project, the balanced literacy professional development, is a collaborative training model that includes 30 hours of formal training. Job-embedded support and

follow-up after each professional development session will be critical components of the project (Guskey & Yoon, 2009). The balanced literacy professional development is structured for third-grade teachers who implement the balanced literacy framework for literacy instruction. The maximum number of participants for the balanced literacy professional development will be 20 teachers. The balanced literacy professional development will be connected to daily school practice, the specific characteristics of the balanced literacy framework, and apply research-based practices (Taylor & Duke, 2013; Visser, Coenders, Terlouw, & Pieters, 2010). The focus for the professional development will be to enhance third-grade teachers' content and pedagogical knowledge and skills needed for implementing the district's balanced literacy framework. Ultimately, the balanced literacy professional development reflects what the literature review emphasized concerning meaningful professional development. Intentionally, third-grade teachers will learn from a diverse range of activities, which include formal trainings, planning and collaborating with colleagues, and applying what is learned in the workplace (David, 2013; Webster-Wright, 2009).

**Learning Outcomes**

Third-grade teachers will employ what they have learned from the balanced literacy professional development in following the district's balanced literacy framework for reading instruction (See Appendix A). The anticipated learning outcomes of the balanced literacy professional development are that third-grade teachers will accomplish the following:

- Define the term balanced literacy in accordance to the district's framework.

- Plan and model literacy lessons that apply the balanced literacy framework.

- Differentiate instruction based on students' reading levels as measured by benchmark assessments; and

- Determine suitable assessments to measure student progress.

**Needed Resources**

The five formal professional development days will be conducted on days identified on the district's calendar for professional development. By scheduling the training on district professional development days, participating teachers will not need substitute teachers. As I will facilitate the trainings, I will request compensation in the form of licensure renewal points. The required resources are needed for the balanced literacy professional development:

- Approval from the district's Executive Director of Curriculum and Instruction and/or the school board to implement the balanced literacy professional development

- Support from the district's administrative team, instructional coaches, and elementary administrators;

- Support from third-grade teachers to participate in the balanced literacy; professional development with the intention of implementing the practices with fidelity;

- Approval and support from the technology department to create a balanced literacy Edmodo page to communicate about program updates, ideas, and collaborative professional discussions;

- Permission from the Director of Professional Development to conduct the

    professional development at an approved district facility on approval dates;

- Approval of the professional development plan and allocation of certification

    points for participants by the Director of Professional Development.

Additional resources needed are readily accessible and available. By accessing the

district's curriculum and instruction webpage, the districts balanced literacy framework is

available. As a requirement for participation, teachers must teach third-grade reading. To

support the understanding of the district's balanced literacy framework and its

implementation, the reading coach is another available resource. At each of the

elementary schools, a reading coach supports teachers with literacy instruction.

**Potential Barriers**

There are apprehensions of potential barriers that could hinder the success of the

professional development. Initially, the district's executive board and/or school board

could disapprove the project. Another barrier is elementary administrators might not

support the project. Furthermore, there is concern that third-grade teachers might not

adequately implement the balanced literacy framework or implement with little or no

fidelity. Teachers can be resilient to change. Lastly, a barrier to think over is failure of the

balanced literacy professional development facilitator to demonstrate the ability to work

with teachers and to provide the appropriate assistance and guidance to teachers

experiencing levels of discomfort or struggles in following the balanced literacy

framework. Because the focus of the balanced literacy professional development is to

enhance teacher learning (Beswick, 2014; Walker, 2013) of how to design and teach

lessons utilizing the balanced literacy framework, executing the balanced literacy professional development will include maintaining support to teachers in a timely and responsive manner.

**Timetable**

Teacher participation in the balanced literacy professional development will be voluntary. The participants will attend six training sessions over the course of an academic school year, 9 months, August through April (See Appendix A). Each professional development session will be six hours; a total of 30 hours of formal training, dependent on approval of the Director of Professional Development. In preparation, the months of April through June will involve requesting teacher participation and online registration for the upcoming school year. The program will be advertised on the district's website in addition to sending an invitational e-mail to all third-grade teachers through district e-mail. The flyer for the professional development is included in Appendix A of the project section. The advertisement will provide a brief description of the balanced literacy professional development; re-certification renewal, and a link to register for participation. Additionally, all elementary administrators will receive the same recertification so that they are always knowledgeable of the professional development that supports the instructional framework.

After teachers have registered for the professional development, they will complete an online pre-evaluation, a needs assessment survey (See Appendix A). The survey will provide a guide in designing the professional development in order to accommodate the needs of the teacher participants. In addition, the balanced literacy

professional development calendar, schedule of events, and presentation are included in Appendix A of the project section.

Beginning in early August, the first 2 days of the professional development will occur over two consecutive days. Scheduling the professional development during this time of year will enable the teacher participants the necessary time to learn, plan, and prepare for students as the school year begins late-August. All of the professional development sessions will be conducted in one of the district's professional development facilities. I will facilitate the balanced literacy professional development. The district supplies all teachers with a laptop which they will need at each session.

During the first day of professional development (See Appendix A), the session will start with teachers completing a sign-in sheet to record their attendance. Next, I will welcome the teachers and do activities to introduce all participants and allow everyone to get acquainted. The seating will be arranged purposefully in small groups of four. I will review the professional development agenda (See Appendix A) and present the objectives and learning outcomes of the balanced literacy professional development for day one. The first activity on the agenda is to provide teachers feedback from the online needs assessment survey. I will respond and validate the survey data. Teachers will be prompted to explain and add additional or new information. For the remainder of the session, I will present a series of mini interactive activities that entail active involvement (David, 2013) by the third-grade teacher participants. Teachers will work collaboratively in small groups in order to complete the assigned activities on qualities students need to demonstrate in the 21st century, historical information and characteristics of

constructivist's practices and balanced literacy, and evaluate a research article on balanced literacy. Teachers will learn about, visit, and use the balanced literacy Edmodo page, review the district's balanced literacy framework and its resources, as well as cooperatively prepare and demonstrate a model lesson for the first day of school. At the conclusion of the session, I will review the objectives for the day and ask participants to complete an exit ticket. Participants will use the exit tickets to provide feedback on three areas: strength(s) of the session, area(s) for improvement and/or concerns, and questions and/or comments.

On the second day of professional development, the focus of the session will be building learning communities within the classroom, assessing student learning, student portfolios, layout of the classroom, and collaborating and planning following the balanced literacy framework (Kriete & Davis, 2014). Participants will be able to use the afternoon as a work session in which they work in small groups to review and develop lessons aligned to the balanced literacy framework. Teachers will develop reading lessons based on the balanced literacy framework, identify essential questions, learning skills, and objectives, and align to the third-grade standards (Wiggins & McTighe, 2011). I will supervise the work of the participants intently and plan opportunities for whole group discussion and sharing. In addition, teacher participants will select one of the balanced literacy lessons that they developed and teach the lesson to the group. Highlights of the discussion will include identifying balanced literacy components, constructivist's practices, and the needed resources. At the conclusion of the session, the participants will review the objectives for the second session and complete an exit ticket. The exit ticket

provides an efficient means of evaluating the professional development. Again, teacher participants will provide feedback on three areas: strength(s) of the session, area(s) for improvements and/or concerns, and questions and/or comments.

After the initial two sessions of professional development, teacher participants will be responsible for collaboratively planning with their school's third-grade team members. Teachers will apply what they have learned to their daily reading instruction. Participating teachers will communicate knowledge and information from the balanced literacy professional development with grade level team members at their schools. For the remainder of August through October, participants will plan, collaborate, instruct, and reflect on the implementation of their balanced literacy lessons (See Appendix A). Teacher participants will also be required to complete and post on the balanced literacy professional development Edmodo page on balanced literacy lessons or student activities and submit a monthly student progress report. Maintaining a journal, hard copy or electronic, for reflection can be powerful in the professional growth process (Sailors & Price, 2010; Walker, 2013). The monthly progress reports will contain a summary of participating teachers' reflections of daily practices and student learning behaviors. In addition, teachers are encouraged to use online discussions as a support system for communicating and collaborating with other participants in the program.

The third professional development session will be scheduled after the end of the first quarter, near the end of October, and will last approximately 8 hours (See Appendix A). I will facilitate informal conversations of how participants are progressing, planning, collaborating, and teaching practices applied in the first 9 weeks. Teachers will discuss

and share strategies and practices that are going well, areas of concern, and where support is needed. In this professional development session, teachers will need to bring students' work samples and reading data of students reading below, on, and above grade level to share how they are differentiating instruction to address students' individual needs. This collaborative discussion will lead into the next activity, which is training the teacher participants to use the computer-based interactive assessment program, Mastery Connect.

By using the interactive assessment computer-based program, teachers can select from a vast range of reading passages, questions, technology enhanced items, and multiple-choice items for teaching, reinforcing skills and assessing student learning. While working in small groups, participants will create and/or upload an independent practice assignments aligned to a third-grade reading standard that has been assigned by the facilitator. All third-grade teachers are able to access the resources, including units of study, anchor lessons, student activities, and assessments, which are uploaded to the assessment program. At the conclusion of the session, the participants will review objectives for session three of the professional development and complete an exit ticket.

From the period of November through January, the teacher participants will work with their school's grade level team members on the unit of study for the second nine weeks. They will complete and post on the Edmodo page a balanced literacy lesson or student independent practice and submit a monthly update of students' progress. The teacher participants will continue to use the Edmodo online discussion tool as a support system for communicating and collaborating with fellow teacher participants.

Near the end of January, the fourth session of the professional development will be conducted (See Appendix A). As a part of this session, teacher participants will review student work, instructional practices and assessment data to determine if students are progressing as planned in reading, and if progress is not evident, participants will collectively discuss and determine next steps. The district's unit of study for the third nine weeks will be reviewed. Teachers will collaborate in small groups before sharing with the whole group. Additionally, teacher participants will validate student success and problem solve concerns. Teachers will collaboratively plan for instruction utilizing the unit of study. At the conclusion of the session, participants will review the outlined objectives for the session and complete an exit ticket.

Following the fourth session, teacher participants will continue to plan, collaborate, and teach through April, with their school's grade level team members using the balanced literacy anchor lessons for the quarter. As teachers complete the lessons, they will post on the Edmodo page a balanced literacy lesson and submit an updated student progress report on a monthly basis. The participants will also use the Edmodo page to support, communicate, and collaborate with fellow participants.

In March, the fifth session of the professional development (See Appendix A), participants will share balanced literacy practices and the effect on student progress and learner behaviors. Teacher participants will present three student portfolios to discuss, analyze, and evaluate for examples of students reading below, on, and above benchmark standards. They will share and summarize findings, ideas, and concerns on chart paper to share with the whole group. Once in small groups again, teacher participants will plan for

balanced literacy lessons to implement with the unit of study for the final quarter of the school year. At the conclusion of the session, participants will review the objectives for the session and complete an exit ticket.

Following the fifth session, teacher participants will continue to plan, collaborate, and teach through April, with their school's grade level team members on lessons for the final quarter. As teachers complete their lessons, they will post on the Edmodo page the balanced literacy lesson and submit an updated student progress report on a monthly basis. The participants will also use the Edmodo page to support, communicate, and collaborate with fellow participants.

In March, the fifth session of the professional development (See Appendix A), participants will share balanced literacy practices and the effect on student progress and learning behaviors. Teacher participants will present three student portfolios to discuss, analyze, and evaluate for examples of students reading below, on, and above benchmark standards. They will share and summarize findings, ideas, and concerns on chart paper to present to the whole group. Once in small groups, teacher participants will plan for balanced literacy lessons to implement in the fourth quarter. At the conclusion of the session, the participants will review the objectives for the session and then complete the exit ticket.

Once teacher participants complete the last balanced literacy lesson, the lesson and an updated monthly student progress report will be posted on the balanced literacy Edmodo page. Participants will also complete the online balanced literacy post evaluation (See Appendix A) within the first week of April. At the final balanced literacy

professional development session, a report that details the student achievement results will be presented.

During the final professional development session, day six (See Appendix A), teacher participants will view a video clip of themselves implementing balanced literacy lessons and analyzing student work samples and projects. Teachers will discuss and collaborate on constructivist and balanced literacy practices observed. Next, I will display the results of the post evaluation and facilitate an open discussion of the feedback results. After conducting the activity related to the feedback, the final activity will be to acknowledge and celebrate the third-grade teacher participants for completing the balanced literacy professional development and award participants with their certificates of completion.

**Roles and Responsibilities of Involved Parties**

All involved parties, including building administrators, teachers, students, and the balanced literacy professional development facilitator, have the potential to contribute to the program by accepting full responsibility of their roles in the program. Each group of involved parties has distinct responsibilities, but may take on other responsibilities. The responsibilities of each group have been outlined. Third-grade participating teachers assume the following responsibilities:

- Attend and actively participate in all sessions.

- Be prepared with requested materials (i.e. laptop).

- Complete all online assignments in a timely manner.

- Implement instructional practices and strategies presented in the balanced literacy professional development.

- Routinely check for students' understanding and clarify misconceptions.

Building administrators assume the following responsibilities:

- Promote and encourage sustainment of teacher participation in the balanced literacy professional development.

- Support the instructional strategies and practices implemented in the balanced literacy professional development.

- Acknowledge teachers' work, efforts, and professional growth with stakeholders including students, parents, and faculty and staff members.

Students of the third-grade teacher participants assume the following responsibilities:

- Actively participate in daily classroom instruction.

- Learn and apply the balanced literacy strategies which are implemented in the learning environment.

- Ask questions and/or seek assistance from the teacher to clarify misunderstandings or uncertainty of information presented.

The facilitator of the balanced literacy professional development will assume the following responsibilities:

- Develop and implement well-structures lessons, activities, and resources for all balanced literacy professional development sessions.

- Provide on-going feedback to online discussions within the time frame established.

- Provide on-going support and guidance to participating teachers.

- Follow the balanced literacy professional development syllabus.

**Evaluation**

I will utilize several methods for the third-grade teacher participants to evaluate the balanced literacy professional development. Before beginning the professional development, I will administer a pre-assessment, in the form of an online needs assessment survey, to all third-grade teacher participants (See Appendix A). For this process, I have modified an existing needs assessment survey which was available on Survey Monkey. The data collected from the pre-assessment will enable me to prepare and structure a training program to accommodate the specific learning needs expressed by the third-grade teacher participants.

Throughout the balanced literacy professional development, I will formatively assess the participants' progress to determine if they are applying the strategies and the effects of teachers' practices on student learning. These formative evaluations will include the submission of participating teachers' online lesson assignments, monthly progress reports, course discussions on the balanced literacy Edmodo page, and session exit ticket information. The use of on-going formative evaluations are precise in knowing if learning is on target or if modifications are necessary to achieve learning outcomes (Haslam, 2010).

At the end of the balanced literacy professional development, participating teachers will complete a post assessment (See Appendix A). I will apply an evaluation model endorsed by the National Staff Development Council for the post evaluation phase

(Haslam, 2010). The results from the post evaluation will determine whether the third-grade teacher participants perceived that the balanced literacy professional development met their learning goals, improved balanced literacy instructional practices, and increased students' reading achievement.

Participating third-grade teachers will receive evaluation feedback of the pre-assessment during the first training session. In the first training session, the participants' learning needs will be confirmed and addressed. The formative evaluations will be a part of my continuous evaluation of the program, making adjustments as needed, and providing feedback based on participants' questions and/or concerns raised. The post evaluation feedback will be shared during the last session and followed up by an in-depth discussion of participants' perceptions of instructional practices and student progress. An evaluative report to summarize the results of both the formative and summative assessments will be presented to the district's research committee, building administrators, and participating third-grade teachers.

**Balanced Literacy Professional Development Project Social Implications**

**Local Level**

On the local level, the balanced literacy professional development project study can enhance the district's balanced literacy instructional framework by increasing third-grade teacher participants' knowledge, skills, and understanding of how to fully implement the balanced literacy instructional framework. As all teachers within the district are expected to implement the balanced literacy instructional framework, the balanced literacy professional development project presented has the potential to enhance

teachers' instructional practices. Third-grade teachers utilizing research-based practices for implementing the balanced literacy instructional framework can strengthen their balanced literacy instructional practices, which may lead to increasing students' reading achievement.

Moreover, the balanced literacy professional development project has the potential to increase the district's Grade 3 student reading achievement. Significantly, teachers who implement the balanced literacy research-based practices introduced in the balanced literacy professional development could strengthen students' reading foundation, a lifelong skill.

This project study has the potential to positively contribute to social change by providing third-grade teachers within the district with a balanced literacy professional development designed to improve teaching practices to support students' struggling to read and comprehend grade level text. The implementation of a balanced literacy instructional framework can enrich teachers' knowledge and skills to develop students' reading skills, which prepares students for school success, college, and the global work force.

**Far Reaching**

Extending beyond, the project has the potential to provide other districts with similar concerns regarding student reading achievement and instructional practice to boost student learning and teacher quality. The project, informed by the literature, can actually be applied to any grade level in need of providing balanced literacy professional development, implementing balanced literacy, and increasing student reading

achievement. Furthermore, the study may be of interest to public schools in the United States in need of improvements regarding student reading achievement as mandated by the federal government to close the achievement gap, promote rigorous accountability, and equip students with the literacy skills needed to graduate as college and career ready citizens (United States Department of Education, 2010).

**Conclusion**

I presented my proposed, a balanced literacy professional development program structured to support the district's balanced literacy instructional framework and to enhance third-grade teachers' content and pedagogical knowledge and skills by incorporating best practices for adult learning and for implementing balanced literacy. Additionally, I presented a description of the balanced literacy professional development project, goals, rationale, and literature review. Then, I presented a comprehensive discussion of the project, needed resources, process for implementation, time table, and roles of the involved parties. For the last sections of the project, I addressed the plan for evaluating the professional development project, justification, evaluation goals, and social implications.

In proceeding to the final section of this project study, section 4 will function as an appropriate place to express my reflective thoughts. In section 4, I will analyze the project's strengths, limitations, recommendations in addressing the problem, and overall insights of this scholarly project.

Section 4: Reflections and Conclusions

**Introduction**

The purpose of the study was to explore teacher perceptions of the implementation of balanced literacy to increase student reading achievement. Based on the participants' responses, the project was developed to provide the professional development needed to support implementation of balanced literacy. Throughout Section 4, I will communicate the strengths, limitations, recommendations, and my reflective thoughts relating to the project. My reflective thoughts will convey my viewpoints from developing to evaluating the balanced literacy professional development project. This reflections section will include an analysis of my essential learning points, implications, applications, and targets for future research regarding the project.

**Project Strengths**

There were a number of strengths that arose from the project study. To begin, the project emerged from data collected through the teacher interviews, observations, and focus group discussion in which participants conveyed a desire for professional development to more effectively implement balanced literacy. Professional development that supports reading instruction has been linked to increased student reading achievement (Sailors & Price, 2010). The schedule for the balanced literacy professional development spans from August 2017 through April 2018 (9 months) in order to provide substantial time for teacher development and growth through active involvement, reflection, collaboration, planning, and a variety of learning activities, directed by the literature review. In all, the balanced literacy professional development provides 30 hours

of training that can be used for recertification hours. I selected 30 hours for the professional development based on recommendations from scholarly studies that indicated schools in which educators participated in high quality training of 30 or more hours experienced success (Guskey & Yoon, 2009).

In addition, there are more strengths to include about the project. The project is expected to be cost effective to the district as all sessions have been scheduled for days already designated for professional development. As a result, there will be no need for substitutes or time off for teachers. Another critical element is that the balanced literacy professional development fully addresses pedagogy and is designed to develop teachers' knowledge and skills for implementing the district's balanced literacy framework. Because the balanced literacy professional development is a hands-on interactive training model, third-grade teachers can readily apply what they learn in order to increase the reading achievement of third-grade students. Additionally, the professional development is directly connected to daily instructional practice, the specific components of balanced literacy, and research-based practices for balanced literacy (Kennedy & Shiel, 2010; Sailors & Price, 2010). Lastly, job-embedded support and follow-up are provided after each session (Guskey & Yoon, 2009).

## Project Limitations and Recommendations

The balanced literacy professional development project presents some limitations to be addressed. First, the project was created based on data collected from a small number of teacher participants, and all of the five participants were women. This study did not include perspectives of men teachers as they did not agree to participate in the

study. A small sample size and representation of a single gender may present challenges in generalizing the results. Recommendations for future research would include a larger sample size with both genders represented in order to support the generalization of the study.

Another limitation of the project is the focus on one specific grade level in a single school district. The balanced literacy professional development is tailored to solely support the district's balanced literacy framework. This balanced literacy professional development project could be adapted to serve as a model that reading teachers in any grade level who implements balanced literacy can apply for organizing meaningful professional development to support implementation of balanced literacy.

PLCs are another limitation of the study. Participants should have a complete understanding of and recognize the potential benefits of the district. The teaching profession is often viewed as a practice in complete isolation (Mirel & Goldin, 2012; Ostovar-Nameghi & Sheikhahmadi, 2016). However, members of a PLC must understand that PLCs are an arena for collaboration and trust with colleagues (DuFour et al., 2010). More importantly, members of a PLC must demonstrate their willingness to participate. PLCs must be organized, maintain a clear focus, establish rules and norms, and be goal oriented (DuFour et al., 2010; DuFour & Reeves, 2015). All members of the PLC must be dedicated to the process of PLCs and acknowledge the effort required to belong to effective teams. PLCs are a setting for collaboration and trust; everyone must be willing to participate and contribute (DuFour & Reeves, 2015). Additionally, it is imperative that PLC members establish effective lines of communication. The basic

limitation of this project would be the failure to build those relationships among members of the school community.

The format of the professional development presents an additional limitation of the project. Because the schedule is inflexible, participating teachers will need to attend each session at the identified professional development facility. The balanced literacy professional development has the potential to appeal to more participants if the format were structured differently such as a web-based or blended learning experience. A web-based professional development would eliminate the need for teachers to travel on professional development days. Furthermore, a blended format for professional development would allow more flexibility and varied structures. Both of these options would allow teachers to have flexibility in developing a personal schedule to advance their professional knowledge and skillset for implementing balanced literacy.

**Scholarship**

The scholarship of my research has elicited some aggressive and intensive stages of growth, which has resulted in the development of the balanced literacy professional development project. The depth and breadth of my research study are an outgrowth of completing the curriculum, instruction, and assessment courses along with the prospectus. The abundance of research has fostered a new set of lenses and scholarly vocabulary. I have acquired this knowledge at a pace that has enabled me to examine the big picture, which I have determined to be to identify a real-life, on-the-job issue to explore and problem-solve that can contribute to positive social change. I consider this level of learning as ultimate on the learning spectrum because the level of achievement

demands advancing through a rigorous, time-intensive scientific process to analyze a pertinent issue.

The district in the study implemented the balanced literacy framework to increase reading achievement among its third-grade students. In completing the project study, I learned a great deal about the various approaches to balanced literacy, the philosophies, theoretical background, and the advantages and disadvantages of implementing balanced literacy. Additionally, I learned the characteristics of purposeful professional development and the significance of meaningful training on student achievement. Moreover, I became absorbed in reading peer-reviewed articles and was shocked to uncover that my search for specific articles spotlighting schools experiencing productive professional development studies were limited. The same applied to articles on professional development on constructivist teaching practices as well as balanced literacy, as this was often noted in articles I researched.

## Professional Development and Evaluation

The notion of conducting a project study focusing on balanced literacy generated from my experiences in working with English Language Arts/reading teachers across the district. All kindergarten through fifth grade English Language Arts teachers were required to implement the district's balanced literacy framework, which also meant that the teachers had to learn and understand the components and practices of balanced literacy and problem solve how to implement the framework. In my role as a school administrator within the district in this study, my responsibilities are to support, examine,

and evaluate teachers. As such, I must demonstrate competence in supporting teachers in implementing the balanced literacy framework with fidelity.

My initial step in the project development process was to generate a list of items about which I would need to be well-versed. The list included the definition of balanced literacy, its components, the advantages and disadvantages, and how to best support teachers in implementing balanced literacy. To carry out this step, I invested time researching balanced literacy. While researching the topic, I developed a problem for exploration. Using the Walden University online library, my search began by using the keywords *balanced literacy*, *read aloud, word study, guided reading, shared reading, independent reading, social constructivism, Vygotsky, zone of proximal development, scaffolding, reading,* and *reading comprehension* to find peer-reviewed articles essential to the study.

To address the guiding question and subquestions, I applied a qualitative approach, collected and analyzed multiple data sources, and reported the findings. My findings indicated that third-grade teachers perceived balanced literacy to be effective in increasing student reading achievement. However, teachers indicated that they needed additional training on pedagogical practices of balanced literacy, differentiating instruction to meet student needs, and assessing student achievement in the components of balanced literacy. Teachers experienced a lack of guidance, which led to teachers problem-solving suitable strategies to apply the balanced literacy framework to their reading instruction. I was able to interpret from the participants' responses that they desired more guidance and models of balanced literacy pedagogical practices as well as

opportunities to collaborate with their third-grade English Language Arts teachers, which

led to developing a balanced literacy professional development project.

Planning and developing the balanced literacy professional development project

to align with the National Council for Accreditation of Teacher Education standards for

professional development and the National Staff Development Council characteristics of

high-quality professional development was a major task (Archibald, Coggshall, Croft, &

Goe, 2011; National Council for Accreditation of Teacher Education, 2015; Wei et al.,

2009). I worked to incorporate the critical elements of meaningful professional

development as guided by my second literature review that could lead to strengthening

teacher effectiveness and enhancements in teacher practices that will benefit both

teachers and students. In Appendix A, I created specific resources needed for the

professional development project that included (a) an advertisement for the professional

development, (b) an online website, (c) a syllabus for the professional development, (d)

the agendas for each of the professional development sessions, and (e) formative and

summative evaluations.

The methods I developed for evaluating the balanced literacy professional

development project will be on-going and goal-based. The formative and summative

evaluations will provide a means of determining if participants perceive the professional

development met their learning needs. In accordance to the literature, I created a pre-

evaluation, which serves as a needs assessment survey to guide the planning of

professional development sessions to meet the needs of participants. Formative

evaluations will include exit tickets that participants will complete at the conclusion of

each professional development session, questions and concerns posed, and online assignments and collaborative discussions. Informal assessments of this nature aid in understanding how the participants are progressing and if adjustments are needed. The summative evaluation, the post-evaluation, will be completed by the participants in order to determine the effectiveness of the professional development project, of learning objectives were met, and suggestions to improve the training.

## Leadership and Change

Instructional leadership and change occurred as I completed the requirements of the program, my colleagues sought support from me, and the information and resources I was able to share with others. Working on the project study has truly been a learning opportunity. The greatest personal growth happened as I was compelled to apply my newly acquired knowledge and skills regarding balanced literacy. In all, I recognize that learning is a lifelong process and I will continue to build my knowledge and skills of constructivist approaches to balanced literacy.

Furthermore, instructional leadership means accepting responsibility for the challenges and risks that accompany the promotion of a professional development that has the potential to support the district in increasing reading achievement among third-grade students. I am prepared to provide a meaningful balanced literacy professional development to potentially strengthen teachers' daily instructional practices and promote student achievement. Studies have shown that students perform well on national standardized reading tests and state reading assessments in schools that implement balanced literacy (Allington, 2012; Perkins & Cook, 2012). In addition, Allington (2012)

found that students who were a part of balanced literacy reading instruction outperformed students who received reading instruction following a holistic approach. Implementing balanced literacy with fidelity would support the district in increasing third-grade students' reading achievement.

It is likely that I will confront challenges and resistance as change can be difficult. As an instructional leader, I consistently introduce and promote programs that can enhance student learning. From the research study, I have learned that balanced literacy provides a research-based practice that can increase third-grade students' reading achievement. By developing the balanced literacy professional development, I will be able to support third-grade teachers in developing their knowledge and skills in the pedagogical practices of a constructivist balanced literacy reading classroom.

In implementing the balanced literacy professional development project, I will need firm support by the district's office of professional development, building principals, instructional technology services, and third-grade teachers who are willing to enhance their balanced literacy practices by actively participating in the balanced literacy professional development. Teachers who partake in the professional development must be willing to modify their current instructional practices. These modifications could lead to enhanced student learning. As a result, the data set that emerges could substantiate a need for meaningful professional development which could influence decision makers of the relevance of continuing the balanced literacy professional development.

**Self-Analysis as a Scholar, Practitioner, and Project Developer**

My experience of scholarship included participation in the online course discussions and reflections, completion of the course readings, and communication with my doctoral chair. Additionally, scholarship was developed as I became immersed in discussion with colleagues and other educators regarding policies, trends, concerns, and student learning. As I reflect on my development throughout this doctoral process, I see that it was a great decision to pursue my degree with Walden University. I have advanced through the doctoral program with enhanced knowledge, skills, and understanding of how to critically analyze and problem solve educational issues by applying the scientific research process. Consequently, as I read educational literature now, I critically examine the content and credibility of the sources rather than accepting the information as presented. Furthermore, I have developed my ability to produce scholarly research documents as a result of my course work with Walden University.

As I consider my growth as a practitioner, I have applied some of the research-based constructivist and balanced literacy practices in my school environment. Additionally, as I work with adults through professional development, I have applied the adult learning theory in order to engage participants and provide a more meaningful experience. In my role as an instructional leader, I am responsible for presenting student assessment results and facilitating a discussion about student performance. I have focused on questioning teachers in a nonthreatening approach to obtain information about their daily teaching practices. I have facilitated instructional talks and provided credible sources of information. Moreover, I have noticed practices and strategies that could

support balanced literacy instruction in K – 5 classrooms. In my role, I also provide coaching, professional development, and support with balanced literacy. I have noticed that teachers have become more receptive to my guidance and suggestions for improved instruction and have even sought support.

As a project developer, I have created a ready-to-implement professional development project to support the district's balanced literacy program. In developing the balanced literacy professional development project, I studied all data forms including teacher interviews, observations, and focus group discussions as well as the second literature review. Currently, the district does not provide any balanced literacy professional development or workshops. I would gladly accept the opportunity to present the balanced literacy professional development project.

### Reflective Thoughts of My Work

The reflective thoughts which I have presented represent the significant amount of information acquired throughout this doctoral journey. I have read, reviewed, and processed an extensive amount of information on constructivism, balanced literacy, research-based reading practices, adult learning, and professional development. This tedious process led to the selection of a research topic, formation of the research questions and subquestions, analysis of data, and development of a project. For this journey, I developed a project, a qualitative instrumental case study.

In this instrumental case study, I analyzed the effectiveness of an instrumental framework in a South Carolina school district. The stakeholders within the district required all elementary teachers to implement the balanced literacy framework to

improve reading achievement on state testing. I conducted the study to examine the effectiveness of balanced literacy from the third-grade teacher participants' views. Because there had not been a study conducted, I could provide valuable information from triangulated data and analysis regarding teacher perceptions of balanced literacy in increasing student reading achievement.

After a review of the literature, I uncovered that a gap exists in the number of empirical studies that focus on classroom teachers' actual experiences in implementing balanced literacy (Bingham & Hall-Kenyan, 2013; Kennedy & Shiel, 2010; Pressley & Allington, 2014). This research could support the existing body of literature on balanced literacy through my rich description of teacher perceptions, strategies and practices, and a professional development project for promoting third-grade students' ability to demonstrate reading proficiency with grade-level text. Furthermore, a study of this nature has the potential to benefit other educators and stakeholders who experience similar concerns or function as a professional resource for those exploring the implementation of balanced literacy.

Throughout my course of studies in the doctoral program, I have progressed in my knowledge and ability to analyze and problem-solve educational questions, concerns, and issues. Figuratively speaking, I advanced through the stages of crawling, to walking, and then to running at high speeds in researching the topic of balanced literacy. I became immersed in researching balanced literacy, research-based reading practices, constructivism, and purposeful and meaningful professional development. Currently, I have acquired the ingenuity and passion to facilitate the balanced literacy professional

development. Presented the opportunity, I will carry out the professional development project with fidelity.

## Implications, Applications, and Directions for Future Research

The extensive exploration of the project study elicited the development of the balanced literacy professional development project for third-grade teachers within the district. I developed the balanced literacy professional development project applying the characteristics that define meaningful and purposeful professional development. According to Avalos (as cited by Loughran, 2014), professional development should provide a means of teachers learning how to learn and then transforming their acquired knowledge into practice in order to increase student achievement. When schools focus on research-based instructional practices, previous studies have indicated that there is a positive relationship between professional development and increased student achievement (Guskey & Yoon, 2009). Furthermore, participants are engaged in active-learning and have the flexibility to modify these practices to meet the needs of the learners (Guskey & Yoon, 2009).

Foremost, there are several implications that can result from this project study. Recognizing the value of the classroom teacher in promoting student learning, the balanced literacy professional development project has the potential to enhance third-grade teachers' implementation of balanced literacy by establishing a structured process to follow (Scheer, Noweski, & Meinel, 2012). Additionally, as teachers improve their balanced literacy practices, students could potentially become more proficient readers. As students become more proficient readers, the district may experience an increase in third-

grade students' reading achievement. With the increased third-grade student reading achievement, the district's stakeholders could allocate funding for the balanced literacy professional development.

Furthermore, there is a need to ponder the positive social change that emerges from this project study. Teachers who participate in meaningful professional development and follow through in implementing the balanced literacy practices with fidelity can impact the preparation of third-graders for academic achievement and success in life. Even more, third-grade students have the opportunity to develop the 21$^{st}$ century skills which prepare them to contribute positively in a global society (Roskos & Neuman, 2013; United States Department of Education, 2010).

In conclusion, following the implementation of the professional development, additional research should be conducted to evaluate the effectiveness of the balanced literacy professional development. This can be achieved through a program evaluation study. Future studies could include a mixed-methods approach to compare the effects of the professional development with the results from third-grade students' reading test scores on the state assessment. Comparatively, a longitudinal study can be conducted to gauge the effectiveness of the balanced literacy professional development over an extended period of time.

**Conclusion**

With this qualitative instrumental case study, I explored third-grade teachers' perceptions of the implementation of balanced literacy. My research findings indicated that third-grade teachers considered beneficial resources were the balanced literacy

framework, balanced literacy units of study, collaboration with other third-grade English Language Arts teachers, and the intense training in the components of balanced literacy. In addition, teachers specified a need for professional development that addresses balanced literacy pedagogical practices. Constructed on these findings, I developed a balanced literacy professional development to support third-grade teachers' balanced literacy and pedagogical knowledge and skills by integrating best practices for adult learning and teaching balanced literacy.

I planned a ready-to-implement professional development project to align with the district's balanced literacy implementation. As I designed the balanced literacy professional development project, I studied research-based best practices and strategies described in the second literature review. Moreover, this professional development project as the potential to enhance teachers' implementation of balanced literacy, improve instructional practices, and increase student reading achievement.

Ultimately, I created this project study to problem solve a concern in the local district. Although the professional development has not currently been implemented, I will provide a summary report of the study to the district's research committee and communicate an interest in conducting the professional development sessions. Given the opportunity, I have a professional development resource which is ready to be implemented and that will support the district's balanced literacy implementation and increased reading achievement initiative.

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Appendix A: The Project

**A 1.1          The Flyer**



*Professional Development*
On-going training **August 2017 – April 2018**

Earn 30 hours of Re-Certification Hours



Have you been seeking effective strategies to support students in meeting district and state reading benchmarks?



Are you looking for an opportunity to collaborate with other ELA teachers to share ideas about implementing balanced literacy?



Are you interested in enhancing your knowledge base and instructional practices in Balanced Literacy?

Six (6) sessions of professional development in balanced literacy to guide and support you while you enhance your knowledge and skills in implementing balanced literacy

| Workshop dates: | Participants will: | |
| --- | --- | --- |
| August 8, 2017<br>August 9, 2017<br>October 13, 2017<br>January 2, 2018<br>March 19, 2018<br>April 18, 2018 | • Examine the nature of Balanced Literacy instruction<br><br>• Collaboratively plan and develop lessons<br><br>• Respond to students' needs with guided reading lessons | • Analyze student work and assessment data<br><br>• Unpack the district's Units of Study<br><br>• Demonstrate lessons and reflect on instructional practices |

Register at
True North Logic

A 1.2          Needs Assessment Professional Development Survey

Thank you for registering for the Balanced Literacy Professional Development.  Please take a few minutes and respond to the following questions so that we may prepare for the Balanced Literacy Professional Development and meet your needs.

1.  How many years of teaching experience do you have?  (*Please select one response.*)
  - Less than 3 years
  - 3 – 5 years
  - 5 – 8  years
  - More than 8 years

2.  How interested are you in the following formats for professional development?

| Professional Development Format | Not Interested at All | Not Very Interested | Somewhat Interested | Very Interested |
|---|---|---|---|---|
| Seminar: 2-Day Institute | | | | |
| Mentoring/Coaching | | | | |
| Online – Self paced | | | | |
| Interactive Workshop | | | | |

3.  I can benefit from professional development opportunities addressing effective instructional strategies and teaching practices in the following areas: (*Check all that apply.*)
  - Understanding the Components of Balanced Literacy
  - Differentiated Instruction within Balanced Literacy
  - Assessments for Balanced Literacy
  - Lesson Development for Balanced Literacy

4.  Please indicate the degree to which you would be interested in training in the following areas.

| | Not Interested at All | Not Very Interested | Somewhat Interested | Very Interested |
|---|---|---|---|---|
| Early identification and intervention of students struggling to read and/or comprehend  grade level texts | | | | |
| Analyzing and using data and assessments to improve instruction and student learning | | | | |
| Differentiated instruction methods/strategies | | | | |

| | | | |
|---|---|---|---|
| The effective use of technological resources (technologies) to improve teaching practice and student learning | | | |
| Developing, implementing, and reflecting on Balanced Literacy lessons | | | |

5.  I am interested in the following types of professional development activities.

| Professional Development Activities | Not likely | Likely | Very likely |
|---|---|---|---|
| Collaboratively develop lessons plans aligned to the balanced literacy framework | | | |
| Establish Professional Learning Communities in order to reflect on and improve instruction | | | |
| Apply constructivist's practices to balanced literacy instruction | | | |

6.  What professional development topic(s) related to balanced literacy would you attend?

7.  The MOST effective professional development course/activity that I participated in my career was _____.

8.  In what ways was this professional development activity/course/training you participated MOST effective?

9.  What are your suggestions or ideas to have more meaningful and productive professional development/trainings?

A. 1.3  Balanced Literacy Professional Development Syllabus

| Dates for Sessions | Scheduled Activities |
|---|---|
| April - June | Promote the Balanced Literacy professional development and solicit participation |
| May – June | Online registration |
| May – June | Have registered participants complete the Online Professional Development Needs Assessment |
| August | **1st Session Balanced Literacy Professional Development**<br>8:00 am – 3:00 pm (1.0 hour for lunch) |
| August | **2nd Session Balanced Literacy Professional Development**<br>8:00 am – 3:00 pm (1.0 hour for lunch) |
| September – December<br><br><br>*October: 3rd Session* | School-site: Plan, Teach, Reflect, and Collaborate<br><br>Teachers will be responsible for:<br>• Sharing a minimum of 2 activities, lessons or practices implemented;<br>Due dates:<br>• Assignment #1 End of Wk. 2 of October<br>• Assignment #2 End of Wk. 2 of December<br><br>• Submitting the following items online to the facilitator on a monthly basis:<br>• Discussion of online topic and response to two colleagues<br>• Update of progress<br>• Concerns and questions<br>• Support needed<br> Due date: End of 4th Week of each month<br><br>**3rd Session Balanced Literacy Professional Development**<br>*October* – 8:00 am – 3:00 pm (1.0 hour for lunch) |
| January – April<br><br><br>*January: 4th Session*<br><br><br><br>*March: 5th Session* | School-site: Plan, Teach, Reflect, and Collaborate<br><br>Teachers will be responsible for:<br>• Sharing a minimum of 2 activities, lessons or practices implemented;<br>Due dates:<br>❖ Assignment #1 End of Wk. 2 of February<br>❖ Assignment #2 End of Wk. 2 of April |

| | |
|---|---|
| | • Submitting the following items online to the facilitator on a monthly basis:<br>    • Discussion to online topic and response to two colleagues<br>    • Update of progress,<br>    • Concerns and questions,<br>    • Support needed<br>Due Date: End of 4th Week of each month<br><br>**4th Session Balanced Literacy Professional Development**<br>*January* – 8:00 am – 3:00 pm (1.0 hour for lunch)<br><br><br>**5th Session Balanced Literacy Professional Development**<br>*March* – 8:00 am – 3:00 pm (1.0 hour for lunch) |
| April | Teachers will be responsible for:<br>• Completing online Post-Assessment Survey<br>  Due Date: End of 1st Week of April<br><br>**6th Session Balanced Literacy Professional Development**<br>*April* – 8:00 am – 3:00 pm (1.0 hour for lunch)<br>• Group discussion of professional development<br>• Balanced Literacy and preparation for end of year testing<br>• Present feedback from post-assessment survey<br>• Compare beginning survey results and ending survey results<br>• Celebration |

A. 1.4          Balanced Literacy Professional Development Training Schedule

| Time | Activity |
|---|---|
| 8:00 am – 3:00 pm | *Day One - August*<br><br>Goal(s):<br>• Introduce participants<br>• Present the Balanced Literacy Professional Development syllabus & expectations of participants<br>• Introduce how schools can prepare 21st century students,<br>• Introduce historical and background information on constructivist practices and balanced literacy<br>• Introduce use of Balanced Literacy Professional Development Edmodo page<br>• Unpack/analyze district's balanced literacy unit of study<br>• Plan, collaborate, and practice teach first day of school lessons<br><br>Materials needed:  Copies of Balanced Literacy Professional Development syllabus, PowerPoint presentation of Day 1 information, copies of PowerPoint handouts for teachers to record notes, copies of balanced literacy research article, Smart Board, laptop computer, LCD projector, chart paper, markers, post-it pads, and designated area marked "Jot Lot" |
| 8:00 – 8:45 | *Note: The room should be arranged in groups of four (4) per table.*<br>• Attendance – Participating teachers will sign the attendance sheet; required for recertification points<br>• Welcome and Ice Breaker – Introductions, identify school/years of experience/share one thing expected to learn from the professional development<br>• Housekeeping items addressed (restroom locations, breaks, lunch, evaluation, etc.)<br>• Review Class Syllabus – Overview of program/Protocols for earning recertification points<br>• Jot Lot – Teachers will write questions on a post-it note and place on board space.  Questions will be addressed at the designated times listed on the agenda.  Teachers are not required to identify themselves. |
| 8:45 – 10:00 | Activity One: approximate time – 30 minutes<br><br>Feedback of Online Needs Assessment Survey<br>• Post, discuss, and invite open discussion among teachers<br>• Acknowledge and validate survey data and teacher concerns |

| | |
|---|---|
| | *Note: In the event that new information is presented during open discussion, address how that need or concern will be met. Always involve others who may have reasonable resolutions.*<br><br>Activity Two: approximate time – 45 minutes<br><br>Group Activity – Turn &  Talk and Create Visual on Chart Paper<br>Question for discussion:  What qualities will our students need in the 21st century for success in college, careers and citizenship?<br> o Have one person from the table share.<br> o Allow for open discussion. (approximate time:  10 minutes)<br> o Transition to PPT slide: Tony Wagner a Harvard Professor identified desired qualities of potential employees shared by over 600 CEOs.  High school graduates need to display the following qualities in the 21$^{st}$ century to be college, career, and citizenship ready:  Critical Thinking and Problem Solving, Collaboration across Networks and Leading by Influence, Agility and Adaptability, Innovation and Initiative, Effective Oral and Written Communication, Accessing and Analyzing Information, & Curiosity and Imagination.  Compare the desired qualities to the Profile of a SC Graduate.<br> o Compare and discuss Wagner's findings with what the teachers listed.  Allow teachers two minutes to turn and talk with table members.  Share. (approximate time:  10 minutes)<br> o Transition to PPT slides presenting the essential capacities of 21$^{st}$ century schools.  Present and share with teachers the practices that can lead to school improvement and prepare students to be college, career, and citizenship ready.<br>Question for discussion:  Do you see any of these qualities in your school?  Which of the qualities do you see in your school?<br>Turn and Talk (approximate time: 10 minutes) |
| 10:00 – 10:10 | ***Break*** |
| 10:10 – 10:20 | Activity 3: approximate time – 10 minutes<br><br>Presentation of History of Balanced Literacy and Constructivism in Education |
| 10:20 – 11:45 | Activity 4: approximate time – 10 minutes<br> What is balanced literacy?<br>Question for discussion:  What do you know about balanced literacy?<br>  Take a moment and think. |

| | |
|---|---|
| | Allow teachers to share their responses and ask one volunteer to record responses on chart paper. |
| | Activity 5: approximate time – 40 minutes |
| | Balanced Literacy in the 21st Century Classroom |
| | Show 10 minute video clip on balanced literacy. |
| | Present some background information about the video clip and have teachers purposefully search for the balanced literacy elements that were modeled, features of each, and constructivist practices observed?  Ask teachers how does the district's framework compare with the models in video? |
| | Group Activity (20 minutes): Group discussion and monitoring for understanding of the balanced literacy clip. Teachers will respond to the questions presented.  Each group will assign a recorder and speaker.  Groups will share answers and a visual representation will be displayed. |
| | After each group has presented, participants will take a 'Gallery Walk' to examine the responses concerning what you know about balanced literacy and note the similarities and differences among the various visuals. |
| | Display PowerPoint Slide – Introduce the operational definition of the balanced literacy as defined by Fountas and Pinnel.  Discuss and Share. |
| | Activity 6: approximate time – 30 minutes |
| | Small Group/Large Group Activity – Close Read, Analyze, & Share:  Research article by Kayleigh Siaulys (2013) entitled "A Balanced Literacy Approach in the Classroom" that examines how balanced literacy increases students' reading achievement and prepares students to be skilled readers who are successful in the 21$^{st}$ century.  This research article will be examined through a Jigsaw approach and each group will be assigned a section of the article to explore.  Have one group member record responses on chart paper.  Groups will present recorded responses. |
| 11:45 – 12:45 | **Lunch** |
| 12:45 – 3:00 | Activity 7: approximate time – 20 minutes |
| | Teachers need to have their laptops for this activity. |
| | Introduce participants to the Balanced Literacy Professional Development Edmodo page, provide the group code information to gain access to page, demonstrate how to manipulate the tools, resources, assignment section, upload |

assignments, and post on the discussion board. Review protocols for blogging.

Activity 8: approximate time – 30 minutes
Unpacking the 1st Quarter Balanced Literacy Curriculum for Grade 3
Unpack the Balanced Literacy Units & Resources the Grade 3 Balanced Literacy 1st Quarter Unit
Begin the process of planning the first week of school
Display the slides: "Questions to Consider" – Unpacking the district's balanced literacy unit
Group Activity:  Turn & Talk – Teachers will retrieve the balanced literacy unit of study for quarter one.  Review the standards, indicators, and texts used throughout the unit.  Identify the components with the components presented in the balanced literacy video and district's balanced literacy framework.  Ask teachers, "Are you familiar with the 3rd grade balanced literacy unit plan for the 1st quarter?  Are you familiar with the standards, goals, objectives, and timelines?  What resources do you have to support you in your instruction?"  Brainstorm how to introduce students to balanced literacy and how to introduce engage them in the process. What is critical to know about your students as you plan the balanced literacy lessons? Have a group member record notes.  Discuss and share.

Activity 9: approximate time – 45 minutes
Role Play
Plan and teach a lesson for the first day of school.
Teachers will start small by planning the first day of school. In groups, the participants will collaboratively develop a plan that can be used to teach to your third-grade students using the balanced literacy framework.  Each group will teach the lesson and teachers will take on the role of the students.  Groups can have the option of collaborating with other groups.  Keep in mind the constructivist and balanced literacy practices presented in the video.
Remind teachers of the following ideas/concepts: How will you begin welcoming your students? What will be the first activity you conduct with your students? How will you build a sense of community with your students? How does the balanced literacy unit connect with building a sense of community? How will your rules, routines, procedures, and

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| | expectations connect to the balanced literacy unit?   Will students be involved in developing classroom rules? What resources will you need? <br> Group Discussion:  After all groups have presented, teachers will share what they noticed about the lessons, planning, collaboration, constructivist practices, and balanced literacy practices.  The facilitator will record key points shared. <br><br> Closing Activity: approximate time – 15 minutes <br> • Conduct a quick review of learning events from training session. The intention is to upload the lessons in the "Sharing Ideas" section of the Balanced Literacy Professional Development Edmodo page. <br> • Ask one group member to upload their lesson plan on the website for others to use. <br> • Complete Exit Tickets <br> • Inform teachers of the agenda for Day 2.  The goal is to plan lessons for the first two weeks of school.  Teachers are encouraged to bring books and/or resources to support this work session.  Lastly, remind participants to please bring laptops. |
| 8:00 am – 3:00 pm | *Day Two – August* <br><br> Goals: <br> • Introduce and practice strategies for building classroom communities <br> • Discuss and analyze various methods to assess student learning, student portfolios <br> • Discuss, model, and create balanced literacy lessons <br><br> Materials needed:   PowerPoint presentation of Day 2 information, copies of PowerPoint handouts for teachers to record notes, Smart Board, laptop computer, LCD projector, chart paper, markers, post-it pads, and designated area marked "Jot Lot" |
| 8:00 – 9:00 | *Note: The room should be arranged in groups of four (4) per table.* <br><br> Attendance – Participating teachers will sign the attendance sheet; required for recertification points. <br> Display PowerPoint slide of goals and objectives for Day 2 Session. <br><br> Activity 1: approximate time – 30 minutes |

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| | Building a Sense of Community<br>• Introduce the 4 Sequential Components of Morning Meeting and conduct a Demonstration Activity (*Note:* Some participants may be familiar with morning meeting and some may not be familiar.)<br>• Morning Meeting – The facilitator will conduct a morning meeting with teachers of the four sequential steps, greeting, sharing, group activity (which will be a review of Day 1 events and question/answer session), and announcements (an overview of the events for Day 2).<br>• Discuss and Share<br><br>Activity 2 – approximate time: 30 minutes<br>• Assessing Student Learning<br>1. The participants will discuss various forms of assessments that have used.<br>2. Using a reference guide on various assessments, each group of participants will be assigned three assessments to further explore and present to the group. |
| 9:00 – 9:30 | Activity 3: approximate time – 30 minutes<br>Student Portfolios<br>1. How can portfolios be used to monitor student learning and growth? |
| 9:30 – 10:00 | Activity 4: approximate time – 30 minutes<br>Classroom Physical Environment<br>1. Explore different models of classroom environments that support balanced literacy<br>2. Sketch an outline of the classroom environment |
| 10:00 – 10:10 | **Break** |
| 10:10 – 11:30 | Activity 5: approximate time – 80 minutes<br>Work Session – Planning the first two weeks of school |
| 11:30 – 12:30 | **Lunch** |
| 12:30 – 2:45 | Activity 5 (continued): approximate time – 135 minutes<br>Collaborative Lesson Planning – Planning the first two weeks of school<br>❖ Teachers will work in their small groups planning and collaborating the first two weeks of school.<br>❖ Using the balanced literacy framework and district's curriculum resources, teachers will follow the essential questions, topics of learning, objectives and standards. The facilitator will guide them in this process by monitoring the progress of each group. When teachers have struggles |

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| | during the planning, they will be asked probing questions to get them back on track. |
| 2:45 – 3:00 | Closing Activity: approximate time – 15 minutes<br>1. Review goals and objectives, next steps (work with grade level teams at school sites, plan, collaborate, teach, reflect), and remind teachers of upcoming activities and lessons to upload on the Balanced Literacy Professional Development Edmodo page.<br>2. Address items posted on the "Jot Lot.<br>3. Complete Exit Tickets |
| 8:00 am – 3:00 pm | *Day Three – October*<br><br>Goals:<br>1. Conduct informal conversations with teachers of how they are progressing in implementing balanced literacy and applying the teaching practices<br>2. Analyze and compare work samples of students' reading below, on, and above benchmark<br>3. Practice utilizing Mastery Connect, a computer-based assessment and teaching tool utilized by the district<br>4. Develop assessments and practice lessons to assess student learning.<br><br>Materials needed: PowerPoint presentation of Day 3 information, sample lesson plans, student work, and assessments from participating teachers, Smart Board, laptop computer, LCD projector, chart paper, markers, post-it pads, and designated area marked "Jot Lot" |
| 8:00 – 9:15 | *Note: The room should be arranged in groups of four (4) per table.*<br><br>Attendance – Participating teachers will sign the attendance sheet; required for recertification points.<br>Display PowerPoint slide of goals and objectives for Day 3 Session.<br><br>Activity 1: approximate time – 60 minutes<br>  Analysis of Current Procedures and Progress<br>• Teachers are at the end of the 1st marking period and have completed the balanced literacy unit for quarter one.<br>• Discussion and group input will address the following:<br>  1. Where are we now?<br>  2. What is working in terms of Planning and Collaboration – How is this working at your school? Teaching Balanced Literacy Lessons – What are |

| | teachers noticing about teaching practices? Following timelines?  What's going well?  What are areas of concern?  What do you need help on?  About the Students – Update on student progress<br>• Discuss student behaviors and adjustments to third-grade<br>• Differentiated Instruction:<br>  1. How are teachers accommodating students' learning needs?<br>  2. How many students are reading below benchmark, on benchmark, and above benchmark?<br>  3. How are instruction and learning activities adjusted to meet the needs of students?<br>• Examine student work samples<br>• How do you know that students are learning?<br>• Questions and Concerns |
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| 9:45 – 10:00 am | **Break** |
| 10:00 – 11:00am | Activity 2: approximate time – 60 minutes<br>   Balanced Literacy and Differentiated Instruction<br>1. Guided Reading and Differentiated Instruction go hand in hand.<br>2. Differentiation is a process through which teachers enhance learning by matching student characteristics to instruction and assessment.<br>3. Guided Reading and Differentiated Instruction allow the teacher to scaffold instruction to support readers at their instructional reading level. |
| 11:30 am – 12:30 | **Lunch** |
| 12:30 – 2:45 pm | Activity 3: approximate time – 135 minutes<br>   Using Mastery Connect<br>1. Mastery Connect is a computer-based assessment and teaching tool.  For technical support, an ITS specialist will be invited to this session.  The facilitator will select three reading objectives that teachers will develop practice lessons and/or assessments.<br>  1. Review of the resources, selecting items to assess student learning, learning objectives, and DOK level questioning<br>  2. How to navigate/manipulate the program, set up and administer assessments or practice lessons, and review reports<br>3. Reading – Develop quick checks, practice activities, and assessments to administer to students based on level of |

| | learning, district expectations, and state standards of learning. |
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| 2:45 – 3:00 pm | Closing Activity: approximate time – 15 minutes<br>1. Reminder to teachers:  Teachers should be planning and collaborating with grade level teams for balanced literacy lessons for quarter 2.  The facilitator will monitor and support teachers' progress through the Balanced Literacy Professional Development monthly reflections, blogs, and emails<br>2. Review objectives for Day 3 session.<br>3. Jot Lot – Address items posted. Complete Exit Card |
| 8:00 am – 3:00 pm | *Day Four – January*<br><br>Goals:<br>1. Discuss and share balanced literacy instructional practices<br>2. Bring reading data to show and discuss students' reading progress<br>3. Examine student work samples<br>4. Access Mastery Connect to discuss students' performance as well as the pros and cons of program<br>5. Discuss and share student reports from Mastery Connect<br>6. Unpack and plan balanced literacy lessons for quarter three<br>7. Conduct one practice lesson for participants to critique<br><br>Materials needed: PowerPoint presentation of Day 4 information, sample lesson plans, student work, and assessments from participating teachers, Smart Board, laptop computer, LCD projector, chart paper, markers, post-it pads, and designated area marked "Jot Lot" |
| 8:00 – 9:50 am | *Note: The room should be arranged in groups of four (4) per table.*<br><br>Attendance – Participating teachers will sign the attendance sheet; required for recertification points.<br><br>Display PowerPoint slide of goals and objectives for Day 4 Session.<br><br>Activity 1: approximate time – 110 minutes<br>    Pedagogical Practices (implementing balanced literacy and applying a constructivist approach)<br>1. Whole group/small group – Teachers will bring samples of balanced literacy lessons taught and share experiences in small group. |

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| | 2. Review the district's pacing guide to determine if goals, objectives, timelines were met.<br>3. On chart paper groups will take one of the lessons and list what was noticed about the lesson, components that were evident, how learning was assessed, and how students performed. |
| 9:50 – 10:00 am | **Break** |
| 10:00 – 11:30 am | Activity 2: approximate time – 30 minutes<br>    Reading Progress<br>1. Whole group/small group – Where Are Students Now?<br>2. Teachers will examine and analyze reading data and share student's progress<br>3. Generate next steps for guided reading and differentiated instruction<br>    How are students progressing towards reading on grade level?  What is the average reading level per class?  What trends do you notice?  Are the instructional strategies supporting students?  How do you know?<br><br>Activity 3: approximate time – 30 minutes<br>    Work Samples<br>4. Whole group/small group – What Does the Work Say?<br>5. Examine student work samples to determine if reflective of students' reading ability.  Explain<br><br>Activity 4: approximate time – 30 minutes<br>    Mastery Connect<br>6. Whole group/small group – How Are Students Performing on Assessments?<br>7. What is the average level of performance?<br>8. Are teachers utilizing Mastery Connect to assess students' mastery in each component?  What are the pros and cons of Mastery Connect?  Examine reports. |
| 11:30 – 12:30 pm | **Lunch** |
| 12:30 – 2:45 pm | Activity 5: approximate time – 120 minutes<br>    Collaborative Lesson Planning<br>9. Small group – Teachers will unpack and plan balanced literacy lessons for quarter three and conduct one practice lesson for participants to critique.<br><br>*****     *1:50 – 2:00*     *Break*     ***** |
| 2:45 – 3:00 | Activity 6: approximate time – 15 minutes<br>.    Closing Activity |

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| | 1. Reminder to teachers:  Teachers should be planning and collaborating with grade level teams for balanced literacy lessons for quarter 3.  The facilitator will monitor and support teachers' progress through the Balanced Literacy Professional Development monthly reflections, blogs, and emails<br>2. Review objectives for Day 4 session.<br>3. Jot Lot – Address items posted. Complete Exit Card |
| 8:00 am – 3:00 pm | *Day Five – March*<br><br>Goals:<br>4. Discuss and share balanced literacy instructional practices<br>5. Analyze student work samples, growth portfolios, and Mastery Connect reports<br>6. Examine and discuss students' reading progress<br>7. Collaboratively plan balanced literacy lessons for quarter four<br>8. Conduct one practice lesson for participants to critique<br><br>Materials needed: PowerPoint presentation of Day 5 information, sample lesson plans, student work, and assessments from participating teachers, Smart Board, laptop computer, LCD projector, chart paper, markers, post-it pads, and designated area marked "Jot Lot" |
| 8:00 – 9:00 am | *Note: The room should be arranged in groups of four (4) per table.*<br><br>Attendance – Participating teachers will sign the attendance sheet; required for recertification points.<br><br>Display PowerPoint slide of goals and objectives for Day 5 Session.<br><br>Activity 1: approximate time – 60 minutes<br>    Pedagogical Practices (implementing balanced literacy and applying a constructivist approach)<br>9. Whole group/small group – Teachers will bring samples of balanced literacy lessons taught and share experiences in small group. |
| 9:00 – 9:50 am | Activity 2: approximate time – 60 minutes<br>    Analyzing Student Work<br>1. Teachers will examine 3 student portfolios of a student reading below, on and above benchmark<br>2. Analyze Mastery Connect reading report to identify trends, areas of strength, and areas of concern |
| 9:50 – 10:00 am | **Break** |

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| 10:00 – 11:30 am | Activity 3: approximate time – 90 minutes<br>    Instructional Practices<br>1. Effectiveness of Research-based Instructional Strategies for Balanced Literacy<br>2. Discussion of Modifications that were Needed |
| 11:30 – 12:30 pm | **Lunch** |
| 12:30 – 2:45 pm | Activity 4: approximate time – 120 minutes<br>    Collaborative Lesson Planning<br>3. Small group – Teachers will unpack and plan balanced literacy lessons for quarter four and conduct one practice lesson for participants to critique.<br><br>*****     *1:50 – 2:00*     *Break*     ***** |
| 2:45 – 3:00 pm | Activity 5: approximate time – 15 minutes<br>.  Closing Activity<br>5. Reminder to teachers:  Teachers should be planning and collaborating with grade level teams for balanced literacy lessons for quarter 4.  The facilitator will monitor and support teachers' progress through the Balanced Literacy Professional Development monthly reflections, blogs, and emails<br>**6.** Review objectives for Day 5 session.<br>**7.** Jot Lot – Address items posted. Complete Exit Card |
| 8:00 am – 2:00 pm | *Day Six – April*<br><br>Goals:<br>8. View video clips of teachers and discuss practices<br>9. Discuss next steps and how teachers will prepare students for end of year testing<br>10. Present feedback from post evaluation, compare, and analyze<br>11. Celebrate completing the program – Certificates & Celebration<br><br>Materials needed: PowerPoint presentation of Day 6 information, Smart Board, laptop computer, LCD projector, chart paper, markers, post-it pads, certificates of completion, and refreshments |
| 8:00 – 10:00 am | *Note: The room should be arranged in groups of four (4) per table.*<br><br>Attendance – Participating teachers will sign the attendance sheet; required for recertification points.<br><br>Display PowerPoint slide of goals and objectives for Day 5 Session. |

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| | Activity 1: approximate time – 120 minutes<br>    Teacher Presentations<br>1.  Display video presentations of teacher participants in their classroom setting and delivering instruction.<br>2.  Teacher participants will present student projects.<br>3.  View, discuss, and share balanced literacy experiences, student progress, and teacher practices. |
| 10:00 – 10:10 am | **Break** |
| 10:10 – 11:30 am | Activity 2: approximate time – 80 minutes<br>    Balanced Literacy and Test Preparation<br>1.  Discuss steps teachers have taken to prepare students for the end of the year ELA assessment.  Identify resources used as well as practice tests to predict student achievement level. |
| 11:30 – 12:30 pm | **Lunch** |
| 12:30 – 1:00 | Activity 3: approximate time – 30 minutes<br>    Post Evaluation Feedback<br>2.  Post, discuss, and invite open discussion among teachers<br>3.  Acknowledge and validate survey data and teacher concerns<br>4. |
| 1:00 – 2:00 pm | Activity 4: approximate time – 60 minutes<br>    **Celebration of Completion**<br>5.  Present teacher participants with their Certificates of Completion<br>6.  Enjoy the refreshments! |

A. 1.5          Balanced Literacy Professional Development PowerPoint Handout



BALANCED LITERACY
PROFESSIONAL
DEVELOPMENT

Presented by:

Kimberly Harrison
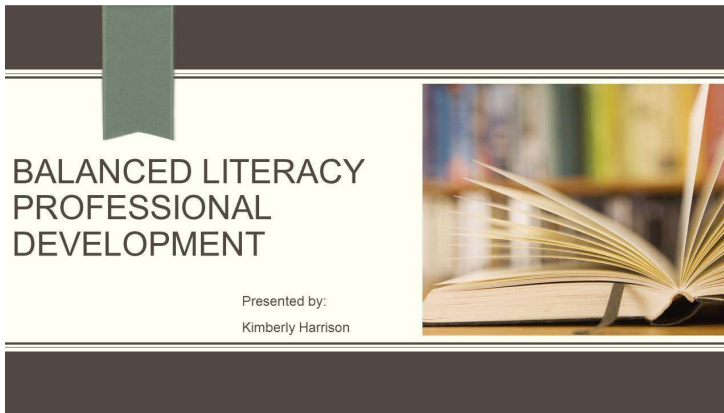
## Session One

Goals:

- Introduce participants
- Review the syllabus & course requirements for the Balanced Literacy Professional Development
- Discuss responses from the Needs Assessment Survey
- Examine the schools' role in preparing 21st Century Learners
- Provide foundational information on constructivist practices and balanced literacy
- Introduce the Balanced Literacy Professional Development Edmodo page
- Unpack the Balanced Literacy Unit of Study for Quarter 1
- Plan, collaborate, and practice teaching lesson for first day and first week of school

## Session One ~ Establishing House Rules

- Ice Breaker ~ 3 Things in Common
- Introduce participants –
  - State your name, school location, and one idea expected to learn in the Balanced Literacy Professional Development
- Review expectations and procedures throughout the sessions
- Review the professional development syllabus
- Questions & Answers

## Needs Assessment Survey Feedback

- *Note: The questions and a summary of results for the Needs Assessment Survey will be displayed.*

- In your group, discuss the following questions and be prepared to share with the group.
  - What similarities and differences were noticed with participants' responses?
  - How did your responses compare to the overall responses to each question?
  - Are there responses that you expected to see? Why or why not?
  - Did any of the responses surprise you? Why or why not?

## Preparing 21st Century Learners

Group Activity:

Turn and Talk with the members of your group (table). Select a recorder and presenter. The recorder will need to write/illustrate your response to the question(s) on chart paper. The presenter for each group will share the responses with the whole group.

**What traits will our students need as a 21st Century Learner in order to be successful in college, careers, and citizenship? How will you as an educator begin to develop these traits in our students?**



## What Our Global Community is Seeking?

- Over 600 CEOs shared the traits that high school graduates need in the 21st century for college, career, and citizenship
  - Critical Thinking & Problem-Solving
  - Collaboration Across Networks
  - Leading by Influence
  - Agility and Adaptability
  - Innovation & Initiative
  - Effective Oral & Written Communication
  - Accessing & Analyzing Information
  - Curiosity & Imagination

- How do these traits compare to what your group developed?



Today knowledge is free. It's like air, it's like water... There's no competitive advantage to knowing more than the person next to you. The world doesn't care what you know. What the world cares about is what you can do with what you know.

— Tony Wagner —

AZ QUOTES
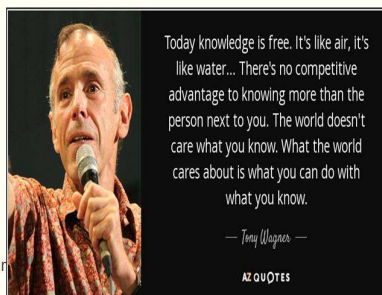
## 9 Characteristics Of 21st Century Learning

- Learner-centered
- Media-driven
- Personalized
- Transfer-by-Design
- Visibly Relevant
- Data-Rich
- Adaptable
- Interdependent
- Diverse



## Constructivism



**What is it?**

The philosophical framework of how one thinks and learns (Ultanir, 2012)

A lifelong process in which learners construct meaning from reality (Liu & Chen, 2010)

**What does it look like?**

a student-centered approach in which students "acquire facts, principles, and theories as conceptual tools for reasoning and problem-solving in meaningful contexts" (Khoja, Sana, Karim, & Ali Rohman, 2009, p. 192)

Students have a more active role in the learning process

Teacher provides information and plans learning experiences that enable students to discover their own meaning (Liu & Chen, 2010).

As a result, students are constructing, creating, inventing, and developing knowledge and meaning

**Social Constructivism**

Knowledge is developed as the learner interprets and synthesizes ideas (Vygotsky, 1978)

The process of development is dependent on social interaction and social learning is what leads to cognitive development

**3 Essential Concepts:**
Zone of Proximal Development (ZPD)
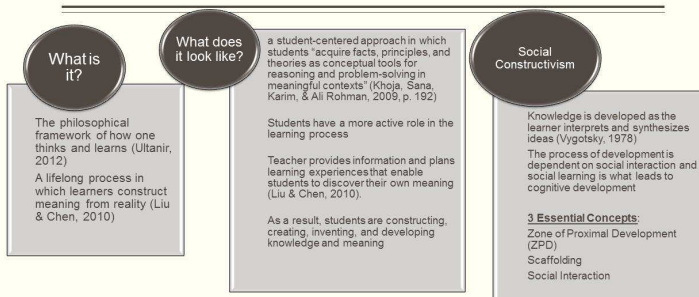Scaffolding
Social Interaction

## Constructivism & Balanced Literacy

- Both balanced literacy and social constructivism emphasize the positive impact that communication has on cognitive development

- Balanced Literacy provides opportunities in which learners are able to construct knowledge and understanding through social interaction, a belief essential to Vygotsky's theory of social constructivism.

- Balanced Literacy applies two ideas critical to social constructivism. Vygotsky's theory of social constructivism includes the zone of proximal development and scaffolding

- Zone of proximal development is evident in balanced literacy through guided reading, shared reading, and independent reading. Teachers apply scaffolding to the balanced literacy components as new concepts are introduced. As learners demonstrate mastery of learning, the amount of scaffolding is adjusted

## Balanced Literacy

- "The Components of Balanced Literacy" video



https://youtu.be/8nhZ7g0955Q

## Balanced Literacy

- What is it?
  - a philosophical orientation that assumes that reading and writing achievement are developed through instruction and support in multiple environments using various approaches that differ by level of teacher support and child control (Fountas & Pinnell, 1996)

  - a combination of interactive strategies with explicit and scaffolded instruction (O'Day, 2009)

  - a curriculum that emphasizes balance in literacy instruction

  - maintains a focus on reading and writing instruction

  - equally addresses all components of literacy.

  - executed through seamless delivery of instruction

  - *across the components of* **read aloud, word study, shared reading, guided reading, independent reading, and writing**

## Review & Discuss

- Distribute copies of the research article "A Balanced Literacy Approach in the Classroom" by Kayleigh Siaulys (2013)

- Read the article independently, and be prepared to justify your responses.

- Discussion Questions:
  - How did the teacher implement Balanced Literacy? What components of balanced literacy were evident?

  - What characteristics of social constructivism were observed?

  - What steps did the teacher take in order to prepare for the lesson? What resources were used? Do you have the same/ similar resources?

  - How did the teacher assess student learning? What forms of assessment were evident?

## Balanced Literacy Edmodo Page

- **How to Join the Balanced Literacy Professional Development Edmodo page:**

1. Login to Edmodo

2. From your home page, scroll down on the left side in the column that is labeled "Groups."

3. Select "Join a Group."

4. Enter the group code: "r9ixxx"



## Aligning the Standards, Balanced Literacy Framework, & Unit of Study

- Teachers will examine the SC College & Career Ready State Standards and the district's pacing guide for the 1st nine weeks of school.

- Examine and discuss the content and skills introduced, taught, and assessed in the 1st nine weeks.

- Using the balanced literacy framework and the unit of study for the 1st nine weeks, plan ELA instruction for the first day of school and then the first week of school.



## First Day of School - Instruction

- In your groups, plan your first day of school.
  - What will students do?
  - What rules, procedures, routines, team building activities, and will be introduced?

- Utilize the district's Lesson Plan for ELA
  - Follows the Balanced Literacy Framework

- How will constructivism practices be applied to your classroom?

- Resources: District instructional resources, professional resources, access to resources

## Questions to Guide the Planning of Balanced Literacy Instruction

- Is your lesson developed using the state ELA standards, district's balanced literacy framework, and unit of study?

- What is the learning objective? Does the instruction align to the expected learning outcome?

- Does your lesson provide opportunities to foster collaborative learning with emphasis on communication, social interaction, independent thinking, collaboration, and problem-solving?

- Are small group lessons differentiated to meet the needs of learners? What data has been used to determine individual needs?

- Are there opportunities to challenge student learning and motivate students to activate their prior knowledge while applying previous acquired skills and strategies?

- How will you assess student learning?

## Role Play

- Plan and teach the lesson for the first day of school

- Other participants will observe the lesson for balanced literacy and constructivist practices

- Share and discuss the strengths and areas for improvement with the lesson.



## Small Group Planning and Closing Activity

- Using the balanced literacy lesson plan template, groups will plan the first week of school

- Refer to the questions to consider while planning

- Closing Activity – Review learning goals for Day One

- Exit Ticket – Distribute exit tickets and have participants respond to the following questions
  - What are the strength(s) of the professional development?
  - Are there areas in need of improvement/of concern? If so, what?
  - Do you are questions/comments?

# BALANCED LITERACY
# PROFESSIONAL DEVELOPMENT

Day Two

Presented by: Kimberly Harrison

## Day Two

Goals:

- Introduce and practice strategies for building classroom communities
- Discuss and analyze various methods to assess student learning, including student portfolios
- Discuss, model, and create balanced literacy lessons
- Continue planning for the first two weeks of school

## Morning Meeting



- A Morning Meeting is an engaging way to start each day, build a strong sense of community, and set children up for success socially and academically.
- Each morning, students and teachers gather together in a circle for twenty to thirty minutes to interact with each other near the beginning of each school day.
- There are four sequential components of the meeting.
- The components intentionally provide opportunities for children to practice the skills of greeting, listening and responding, group problem-solving, and noticing and participating.

## Morning Meeting – The 4 Sequential Components

The four sequential components of the Morning Meeting are:

- **Greeting:** Students and teachers greet each other by name and practice offering hospitality through song, clap, and/or handshakes.

- **Sharing:** Students share information about important events in their lives. Listeners often offer empathetic comments or ask clarifying questions in a positive manner.

- **Group Activity:** Everyone participates in a brief, lively activity that fosters group cohesion and helps students practice social and academic skills (for example, reciting a poem, dancing, singing, or playing a game that reinforces social or academic skills).

- **Morning Message:** Students read and interact with a short message written by their teacher. The message is crafted to help students focus on the work they'll do in school that day.

From Kriete, R & Davis, C. (2014). *The Morning Meeting Book*

## Morning Meeting

- The Morning Meeting merges social, emotional, and intellectual learning. It motivates children by addressing their need to feel a sense of significance and belonging, and the need to have fun.

- Morning Meeting helps students make the transition to school and sets a tone of interactive and engaged learning from the outset of the day.

- Morning Meeting Demonstration: We will participate in a morning meeting to understand the flow of the meeting and each of the sequential steps.

## Assessing Student Learning

- Teachers should implement a variety of assessment tools including, but not limited to:
    - Teacher observations and anecdotal notes
    - Running records (oral reading samples)
    - Student Conference
    - Think, Pair, Share
    - Thumbs Up, Thumbs Down
    - Exit Tickets
    - Writing journals (i.e. One-Minute essay)
    - Reading Response journals
    - Portfolios
    - Culminating Projects
    - Performance Assessments
    - Teacher Created Assessments
    - Common Formative Assessments
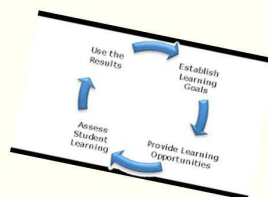
## Student Portfolios



- Student Portfolios are collections of student work representing a selection of performance

- A portfolio may be a folder containing a student's best pieces and the student's evaluation of the strengths and weaknesses of the pieces. It may also contain one or more works-in-progress that illustrate the creation of a product, such as an essay, evolving through various stages of conception, drafting, and revision.

- Portfolios are useful as a support to the new instructional approaches that emphasize the *student's role in constructing understanding* and the *teacher's role in promoting understanding.*

- The Student Portfolio for Balanced Literacy will include:

  - Reading Assessment Data

  - Writing Assessment Data

  - Performance Assessment Data

  - Quarterly Culminating Projects

  - Student Presentations

## Classroom Physical Environment

- The physical environment of the classroom is *crucial* to developing literacy growth for children.

- a place that supports and encourages literacy learning

- provides a setting that encourages and supports speaking, listening, reading, and writing in a variety of authentic ways – through print & digital media

- Essential "Look fors" in a Balanced Literacy Classroom
  - Environmental Print
  - Literacy Tools for Teaching & Learning
  - Classroom Library (Labeled & Leveled)
  - Large Group Meeting Area
  - Small Group Meeting Area
  - Desks/Collaborative Groups
  - Anchor Charts
  - Student Work Samples
  - Literacy Centers (Reading, Writing, Listening, Word Study, Communicating)
  - Readers' Notebooks
  - Writers' Notebooks
  - Posted Learning Expectations

## Collaborative Planning

- Teachers will work in their small groups planning and collaborating the first two weeks of school.

- Using the balanced literacy framework and district's curriculum resources, teachers will follow the state standards and indicators, learning objectives, and essential questions to develop balanced literacy lessons.

- The facilitator will guide them in this process by monitoring the progress of each group. When teachers have struggles during the planning, they will be asked probing questions to get them back on track.

## Questions to Guide the Planning of Balanced Literacy Instruction

- Is your lesson developed using the state ELA standards, district's balanced literacy framework, and unit of study?

- What is the learning objective? Does the instruction align to the expected learning outcome?

- Does your lesson provide opportunities to foster collaborative learning with emphasis on communication, social interaction, independent thinking, collaboration, and problem-solving?

- Are small group lessons differentiated to meet the needs of learners? What data has been used to determine individual needs?

- Are there opportunities to challenge student learning and motivate students to activate their prior knowledge while applying previous acquired skills and strategies? Do you promote higher depths of knowledge?

- At what points in the learning process will you check for understanding?

- How will you assess student learning?

## Closing & Exit Ticket

EXIT TICKET 146017

- Review goals and objectives

- Identify next steps
  - Work with grade level teams at school sites
  - Plan, Collaborate, Teach, and Reflect

- Remind teachers of upcoming activities and lessons to upload on the Balanced Literacy Professional Development Edmodo page

- Address items posted on the "Jot Lot

- Exit Ticket – Distribute exit tickets and have participants respond to the following questions

  - What are the strength(s) of the professional development?
  - Are there areas in need of improvement/of concern? If so, what?
  - Do you are questions/comments?

# BALANCED LITERACY PROFESSIONAL DEVELOPMENT

Day Three

Presented by: Kimberly Harrison

## Day Three

Goals:

- Conduct informal conversations with teachers of how they are progressing in implementing balanced literacy and applying the teaching practices

- Analyze and compare work samples of students' reading below, on, and above benchmark

- Practice utilizing Mastery Connect, a computer-based assessment and teaching tool utilized by the district

- Develop assessments and practice lessons to assess student learning

## Analysis of Current Procedures and Progress

- Group Discussion to address the following:
  - Where are we now?
  - What is working in terms of Planning and Collaboration – How is this working at your school?
  - Teaching Balanced Literacy Lessons – What are teachers noticing about teaching practices?
  - Following timelines?
  - What's going well?
  - What are areas of concern?
  - What do you need help on?
  - About the Students – Update on student progress

- Differentiated Instruction:
  - How are teachers accommodating students' learning needs?

  - How many students are reading below benchmark, on benchmark, and above benchmark?

  - How are instruction and learning activities adjusted to meet the needs of students?

## Analysis of Current Procedures and Progress

- Student Work Samples ~ Gallery Walk
  - Examine student work samples …
  - What standard/indicator is aligned to work sample?
  - Does the work sample provide evidence of opportunities for collaboration, problem-solving, and higher depths of knowledge?
  - Does the work sample require students to activate prior knowledge and apply taught skills and/or strategies?
  - How do you know that students are learning?

- Group Discussion
  - Turn & Talk: With partners in small group, discuss student work samples. What did you notice?
  - Whole Group: Discuss and compare findings

- Questions and Concerns about student reading progress…

## Balanced Literacy and Differentiated Instruction

- Balanced Literacy Program is a comprehensive, differentiated approach to reading and writing instruction.

- It is based on a framework that is designed to help all students learn to read and write effectively.

- Moreover, the component of Guided Reading allows the teacher to further differentiate instruction based on reading levels and individual skill/strategy needs.

- Differentiation is a process through which teachers enhance learning by matching student characteristics to instruction and assessment.

- Guided Reading and Differentiated Instruction allow the teacher to scaffold instruction to support readers at their instructional reading level.

- Guided Reading and Differentiation Explained

## Using Mastery Connect

Through MasteryConnect's MasteryTracker, teachers can effectively assess core standards, monitor student performance, and report student mastery to parents and administrators.

- **ASSESS WITH ANY CONTENT** – Use multiple choice, rubrics, oral assessments, writing assessments or any curriculum or content type.

- **REAL-TIME MASTERY STATUS** – Visualize student performance relative to the core with the traffic light approach of red, yellow, and green mastery status.

- **CURRICULUM MAPS** – Mix and match standard sets, create custom standards, and easily drag and drop standards into any sequence.

- **MULTI-STANDARD / BENCHMARK ASSESSMENTS** – Administer district-created or teacher-created benchmark assessments. Utilize third-party item bank content.

- **STATE AND COMMON CORE STANDARDS** – Convenient 'View Standards' links helps teachers stay focused on teaching and assessing core standards.

- **STANDARDS-BASED STUDENT REPORTS** – Integrated standards-based reports provide real-time information about mastery to students and parents.

- **INTEGRATED STANDARDS RESOURCES** – Easily view resources and content tied to both state and Common Core standards.

- **REMEDIATION / RE-TEACHING** – With focus on individual standards, teachers can easily identify which students are struggling to understand a concept.

- **RESPONSE TO INTERVENTION (RTI)** – With simple reports and the mastery tracker, identifying students for tiered interventions has never been easier.

## Using Mastery Connect

Mastery Connect is a computer-based assessment and teaching tool.

- Review of the resources, selecting items to assess student learning, learning objectives, and DOK level questioning

- How to navigate/manipulate the program, set up and administer assessments or practice lessons, and review reports

- Reading – Develop quick checks, practice activities, and assessments to administer to students based on level of learning, district expectations, and state standards of learning.

## Closing & Exit Ticket

- Review goals and objectives
- Identify next steps
  - Work with grade level teams at school sites
  - Plan, Collaborate, Teach, and Reflect
- Remind teachers of upcoming activities and lessons to upload on the Balanced Literacy Professional Development Edmodo page
- Address items posted on the "Jot Lot

- Exit Ticket – Distribute exit tickets and have participants respond to the following questions

  - What are the strength(s) of the professional development?
  - Are there areas in need of improvement/of concern?  If so, what?
  - Do you are questions/comments?

# BALANCED LITERACY PROFESSIONAL DEVELOPMENT

Day Four

Presented by: Kimberly Harrison

## Day Four

Goals:

- Discuss and share balanced literacy instructional practices
- Bring reading data to show and discuss students' reading progress
- Examine student work samples
- Access Mastery Connect to discuss students' performance as well as the pros and cons of program
- Discuss and share student reports from Mastery Connect
- Unpack and plan balanced literacy lessons for quarter three
- Conduct one practice lesson for participants to critique

## Pedagogical Practices

- Whole group/small group
  - Teachers will bring samples of balanced literacy lessons taught and share experiences in small group.
- Review the district's pacing guide to determine if goals, objectives, and timelines were met.
- On chart paper groups will take one of the lessons and list …
  - what was noticed about the lesson,
  - components that were evident,
  - how learning was assessed, and
  - how students performed

## Student Reading Progress

- Whole group/small group – Where Are Students Now?
- Teachers will examine and analyze reading data and share student's progress
- Generate next steps for guided reading and differentiated instruction
- How are students progressing towards reading on grade level?  What is the average reading level per class?  What trends do you notice?
- Are the instructional strategies supporting students?  How do you know?
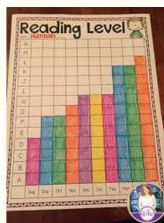
## Student Work Progress

Student Work Samples

- Whole group/small group – What Does the Work Say?
- Examine student work samples to determine if reflective of students' reading ability.  Explain

## Mastery Connect

- Whole group/small group – How Are Students Performing on Assessments?
- What is the average level of performance?
- Are teachers utilizing Mastery Connect to assess students' mastery in each component?
- What are the pros and cons of Mastery Connect?
- Examine reports.

## Collaborative Planning

- Teachers will work in their small groups planning and collaborating the 3rd nine weeks of school.

- Using the balanced literacy framework and district's curriculum resources, teachers will follow the state standards and indicators, learning objectives, and essential questions to develop balanced literacy lessons.

- The facilitator will guide them in this process by monitoring the progress of each group. When teachers have struggles during the planning, they will be asked probing questions to get them back on track.

## Questions to Guide the Planning of Balanced Literacy Instruction

- Is your lesson developed using the state ELA standards, district's balanced literacy framework, and unit of study?

- What is the learning objective? Does the instruction align to the expected learning outcome?

- Does your lesson provide opportunities to foster collaborative learning with emphasis on communication, social interaction, independent thinking, collaboration, and problem-solving?

- Are small group lessons differentiated to meet the needs of learners? What data has been used to determine individual needs?

- Are there opportunities to challenge student learning and motivate students to activate their prior knowledge while applying previous acquired skills and strategies? Do you promote higher depths of knowledge?

- At what points in the learning process will you check for understanding?

- How will you assess student learning?

## Closing & Exit Ticket

- Review goals and objectives
- Identify next steps
  - Work with grade level teams at school sites
  - Plan, Collaborate, Teach, and Reflect
- Remind teachers of upcoming activities and lessons to upload on the Balanced Literacy Professional Development Edmodo page
- Address items posted on the "Jot Lot"

- Exit Ticket – Distribute exit tickets and have participants respond to the following questions
  - What are the strength(s) of the professional development?
  - Are there areas in need of improvement/of concern? If so, what?
  - Do you are questions/comments?

EXIT TICKET

# BALANCED LITERACY PROFESSIONAL DEVELOPMENT

Day Five

Presented by: Kimberly Harrison

## Day Five

Goals:

- Discuss and share balanced literacy instructional practices
- Analyze student work samples, growth portfolios, and Mastery Connect reports
- Examine and discuss students' reading progress
- Collaboratively plan balanced literacy lessons for quarter four
- Conduct one practice lesson for participants to critique

## Pedagogical Practices

- Implementing balanced literacy and applying a constructivist approach

- Whole group/small group
  - Teachers will bring samples of balanced literacy lessons taught and share experiences in small group.

- Review the district's pacing guide to determine if goals, objectives, and timelines were met.

- On chart paper groups will take one of the lessons and list …
  - what was noticed about the lesson,
  - components that were evident,
  - how learning was assessed, and
  - how students performed

## Student Work Progress



Student Portfolios

- Whole group/small group – What Does the Work Say?

- Teachers will examine 3 student portfolios of a student reading below, on and above benchmark

- Analyze Mastery Connect reading report to identify trends, areas of strength, and areas of concern

## Instructional Practices

- Balanced Literacy is based on providing the best instruction possible…and then providing students with opportunities to work independently after appropriate gradual release of responsibility

- A variety of instructional practices

- A variety of instructional materials

- Uses trade books, leveled texts, and basal readers

- Authentic and Explicit Literacy Instruction and Learning Activities

- Develops Students Skills Knowledge (decoding, comprehension, spelling, etc.)

- Includes word study and phonics within authentic explicit teaching and extension literacy activities

## Collaborative Planning

- Teachers will work in their small groups to unpack and collaboratively plan balanced literacy lessons for the last quarter of school. Teachers will conduct one practice lesson for participants to critique.

- Using the balanced literacy framework and district's curriculum resources, teachers will follow the state standards and indicators, learning objectives, and essential questions to develop balanced literacy lessons.

- The facilitator will guide them in this process by monitoring the progress of each group. When teachers have struggles during the planning, they will be asked probing questions to get them back on track.

## Questions to Guide the Planning of Balanced Literacy Instruction

- Is your lesson developed using the state ELA standards, district's balanced literacy framework, and unit of study?

- What is the learning objective? Does the instruction align to the expected learning outcome?

- Does your lesson provide opportunities to foster collaborative learning with emphasis on communication, social interaction, independent thinking, collaboration, and problem-solving?

- Are small group lessons differentiated to meet the needs of learners? What data has been used to determine individual needs?

- Are there opportunities to challenge student learning and motivate students to activate their prior knowledge while applying previous acquired skills and strategies? Do you promote higher depths of knowledge?

- At what points in the learning process will you check for understanding?

- How will you assess student learning?

## Closing & Exit Ticket

- Review goals and objectives

- Identify next steps
  - Work with grade level teams at school sites
  - Plan, Collaborate, Teach, and Reflect

- Remind teachers of upcoming activities and lessons to upload on the Balanced Literacy Professional Development Edmodo page

- Address items posted on the "Jot Lot"

- Exit Ticket – Distribute exit tickets and have participants respond to the following questions

  - What are the strength(s) of the professional development?
  - Are there areas in need of improvement/of concern? If so, what?
  - Do you are questions/comments?

# BALANCED LITERACY PROFESSIONAL DEVELOPMENT

Day Six

Presented by: Kimberly Harrison

## Day Six

Goals:

- View video presentations of teachers and discuss practices
- Discuss next steps and how teachers will prepare students for end of year testing
- Present feedback from post evaluation, compare, and analyze
- Celebrate completing the program – Certificates & Celebration

## Teacher Presentations

Balanced Literacy and Test Preparation

## Post Evaluation Feedback

Feedback of Online Post Evaluation Survey

- Post, discuss, and invite open discussion among teachers
- Acknowledge and validate survey data and teacher concerns



## Celebration of Completion

A. 1.6          Post Evaluation

**The Balanced Literacy Professional Development Post Evaluation**
*Surveying Participants' Views of the Balanced Literacy Professional Development*.
Please complete the post evaluation by selecting one response for each question.  I would
like to say thank you to all third-grade teachers for your participation and input.

1.  Which of the following best describes the Balanced Literacy Professional
Development?  **The Balanced Literacy Professional Development supported me by
…** (*Select one.)*
1.   Helping me to understand how to teach following the balanced literacy framework
2.   Providing an opportunity to collaborate and learn from colleagues
3.   Communicating new ideas for me to consider using in my classroom
4.   Guiding me in applying various instructional practices for balanced literacy
5.   The Balanced Literacy Professional Development *did not* support me.


2.  Which of the following statements best describes the practicality of the Balanced
Literacy Professional Development?  (*Select one.*)
1.   It provided the training that I needed.
2.   It provided the training that I needed, but I have a lot of questions.
3.   It provided the training that I needed, and I look forward to using the new ideas in my
      classroom.
4.   It provided everything I need to use the new ideas in my classroom.
5.   I don't think that these ideas will work very well in my classroom.
6.   It's too soon to tell.

3.  Indicate the extent to which the Balanced Literacy Professional Development met
your professional needs.  (*Select one.*)
1.   It addressed my professional learning needs *completely*.
2.   It addresses *some* of my professional learning needs.
3.   It *did not* address my professional learning needs.
4.   This professional development did not help much because I was already familiar with
      this topic.

4.  To what extent was the Balanced Literacy Professional Development aligned with the
district's goals for increasing student reading achievement?  (*Select one.*)
1.   The Balanced Literacy Professional Development was very closely aligned with goals
      for increasing student reading achievement.
2.   The Balanced Literacy Professional Development was somewhat aligned with goals
      for increasing student reading achievement.

3. The Balanced Literacy Professional Development was not aligned with goals for increasing student reading achievement.

4. The Balanced Literacy Professional Development was inconsistent with goals for increasing student reading achievement.

5. Which of the following statements best describes the support that you received from your principal to participated in the Balanced Literacy Professional Development? (*Select one.*)

1. The principal strongly encouraged me to participate.

2. The principal encouraged me to participate.

3. The principal tried to discourage me from participating.

4. I did not discuss the professional development with the principal prior to participating.

6. Which of the following statements best describes the support that you received from your principal to apply what you learned in the Balanced Literacy Professional Development in your classroom? (*Select one.*)

1. The principal has encouraged me to apply what I learned in my classroom.

2. The principal has encouraged me to apply what I learned in my classroom and has offered to help.

3. The principal has not encouraged me to apply what I learned in my classroom.

4. I have not discussed what I learned with the principal.

7. Which of the following statements best describes the likelihood that you will apply what you learned in the Balanced Literacy Professional Development in your classroom? (*Select one.*)

1. I have already (practiced/applied) (skill/practice) in my classroom.

2. I have already (practiced/applied) (skill/practice) in my classroom, and it seemed to work well.

3. I have already (practiced/applied) (skill/practice) in my classroom, but it was not appropriate for my students.

4. I look forward to (practicing/applying) (skill/practice) in my classroom in the next few weeks.

5. I look forward to (practicing/applying) (skill/practice) in my classroom sometime later this year.

6. I would like to (practice/apply) (skill/practice), but I do not have the materials that I need.

7. I do not think that these things will work with my students.

8.  Which of the following statements best describes how the Balanced Literacy Professional Development compares with other professional developments in which you have participated during the past year?  (*Select one.*)
1.  I have already applied the strategies in my classroom.
2.  I have already applied the strategies in my classroom, and it seemed to work well.
3.  I have already applied the strategies in my classroom, but it was not appropriate for my students.
4.  I look forward to applying the strategies in my classroom sometime later this year.
5.  I would like to practice the strategies, but I don't have the materials I need.
6.  I don't think that these things work with my students.

Appendix B: Letter of Request to Building Administrator

September 8, 2016

Dear _____:

My name is Kimberly Harrison and I am a student in the doctoral program at Walden University.
I am conducting a research project on third-grade teachers' perceptions of balanced literacy.  The purpose of the study is to uncover third-grade teachers' perceptions of the balanced literacy framework, the pros and cons of this approach, and additional support needed to better support students through the balanced literacy framework.  Reading achievement has been a continual focus for the district and state and balanced literacy has been implemented to support student reading achievement.  This study will further increase understanding of how the perceptions of teachers influence effective implementation and enable stakeholders to consider the support teachers need in implementing balanced literacy.

As a part of the data collection process, I will arrange times after school hours to interview third-grade teachers in your building and conduct observations of their balanced literacy block. Please know that information collected will be used for the study only.  No names of participants or school sites will be mentioned in the study.  I am asking for your support in this process by allowing me to meet briefly with your third-grade teachers after normal school hours.

I have been granted permission from Walden University (approval #05-03-16-0337907) and the district's review committee to conduct the study.  Please view the attached document granting me permission to conduct the study.  I am available to meet with you or arrange a telephone conference to discuss the details of the study and address questions or concerns. You can also contact me at ████████████████████. Thank you for your cooperation.  At the conclusion of my study, I will present you a copy of the study.

Sincerely,

*Kimberly Harrison*

Kimberly Harrison

Appendix C: District's Approval Letter

████████████████████████

**Accountability, Assessment, Research and Evaluation**

August 31, 2016

Kimberly Harrison

████████████████████

Dear Kimberly Harrison:

The Research Committee of █████████████████████████████ has *approved* your research study entitled *"A Case-Study of Third Grade Teachers Perceptions of Balanced Literacy."* This approval is good for the 2016-2017 school year.  If your research extends past the approved timeframe, you must reapply for an extension.

You are free to coordinate with the schools to request via email voluntary participation from teachers at ████████████████████████████. ████████ standard protocol for request for research participation is limited to two email attempts only and I must be copied on all email correspondence ████████████████.

Lastly, please maintain the confidentiality of the data and do not make public the name of the district, the schools, the teachers, the students or the parents, if applicable.  We also ask that you provide us with a final report of your findings.

Sincerely,

████████████████

CC ████████████████████████

████████████████████████

Appendix D: NIH Certification

**Certificate of Completion**

The National Institutes of Health (NIH) Office of Extramural Research certifies that **Kimberly Hunt** successfully completed the NIH Web-based training course "Protecting Human Research Participants".

Date of completion: 03/29/2014

Certification Number: 1438955

Appendix E: Principal Reminder E-mail

Date


Dear _____,

As a reminder, a meeting has been scheduled for _____ at \_ pm for the third-grade teachers at your school.  We will meet in the Media Center.  Thank you in advance for your cooperation.

Sincerely,


Kimberly Harrison

Appendix F: Invitational E-mail

Date

Dear _____,

Greetings! My name is Kimberly Harrison and I am conducting a meeting with the third-grade teachers at your school.  As a student in the doctoral program at Walden University, I am conducting a study on third-grade teachers' perceptions of balanced literacy.  I have been granted permission from Walden University (approval #05-03-16-0337907) and the district's review committee to conduct the study.  Your attendance in this meeting is requested because you are a third-grade teacher currently implementing balanced literacy in this South Carolina school district.  At the meeting, I will discuss the nature of the study and how your participation will increase understanding of teacher perceptions of balanced literacy.  The meeting has been scheduled for _____ at _ pm and will be held in the Media Center.  I would like to thank you for your time and consideration.

Sincerely,


Kimberly Harrison

Appendix G: Participants' Reminder E-mail

Date


Dear _____,

As a reminder, a meeting has been scheduled for this afternoon at _ pm for the third-grade   teachers at your school.  We will meet in the Media Center.  Thank you again for your time and consideration.

Sincerely,


Kimberly Harrison

Appendix H: Follow-up E-mail

Date


Dear _____,

It was a pleasure to meet with you last _____ to discuss the study I am conducting on teacher perceptions of balanced literacy.  As a third-grade teacher in this South Carolina district that implements balanced literacy, you have the potential to provide indispensible information about the approach.  Your participation will be greatly appreciated and in return you will have the opportunity to learn about balanced literacy from the literature review and final project.  Also, participants can learn what other teacher participants think from sharing their perceptions and can learn how their perceptions compare to the responses of the other participants.  More benefits are teachers learn some evidence-based strategies for improving teacher practice and student learning for third-grade students struggling to read and meet grade level reading proficiency expectations.  In addition, the study may promote social change by providing educators a balanced literacy approach to study for helping struggling third-grade students improve their reading and comprehension skills. You are asked to please inform me of your willingness to participate by emailing me at ████████████████████ by _____.  I appreciate your cooperation.

Sincerely,



Kimberly Harrison

Appendix I: Thank You E-mail

Date


Dear _____,

I would like to thank you for your willingness to participate in this study on teacher perceptions of balanced literacy.  Your participation and the opinions you share are extremely valuable to the study.  To begin, I am requesting a date and time within the two-week window provided below to meet for the interview.  The interview must be conducted after normal school hours and will take approximately 45 minutes to one hour based on your responses.  As a reminder, I will travel to your school site for your comfort and convenience.  Be sure to sign the consent form provided during the meeting and have it available for me before we start the interview.  If you need another copy, I have attached the consent form to this message.  You are also urged to maintain a copy of the signed consent form for your records. *Please be sure to respond promptly in order to reserve the date and time that is most convenient for you.*

Sincerely,


Kimberly Harrison

|  | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|---|
| Week One (Select a time after 2:45 pm) |  |  |  |  |  |
| Week Two (Select a time after 2:45 pm) |  |  |  |  |  |

Appendix J: Balanced Literacy Interview Protocol

The interview protocol contains ten questions listed to provide information needed in

support of answering the guiding research question, "What are teachers' perceptions of

the balanced literacy framework in regards to increasing third-grade students' reading

achievement?" The research sub questions are as follows: 1) How do teachers define

balanced literacy? 2) How does the balanced literacy framework guide reading

instruction?  3) What literacy components and literacy structures do teachers emphasize?

4) Which components of balanced literacy do teachers perceive as most essential to

increasing reading achievement? 5) How do teachers perceive balanced literacy to impact

student achievement?

Thank you for participating in the study.  As a part of the data collection process, an

interview will be conducted, in which you will respond to the following questions.

Responses will be audio recorded and transcribed.  The interview data is confidential and

the participant's name will not be disclosed in the study.  You will receive a transcribed

copy of the interview data to verify the accuracy of the information you provided.


Questions:
1)  What are your ideas about the teaching of literacy? What principles or philosophies
shape your ideas?  What is your definition of balanced literacy? *(RQ1: How do teachers
define balanced literacy?)*


2) How would you describe each of the following components: a) read aloud, b) word
study, c) shared reading, d) guided reading, e) independent reading, and f) writing?
*(RQ1: How do teachers define balanced literacy?)*

3) How have you implemented balanced literacy into your classroom?  How does the district's balanced literacy framework guide your reading instruction? *(RQ 2: How does the balanced literacy framework guide reading instruction?)*

4) What balanced literacy components and literacy structures do you use?  Are any of these components more critical to literacy development than the other?  *(RQ 3: What literacy components and literacy structures do teachers emphasize?  RQ 4: Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement?)*

5)  How do you decide how much time to designate for each component of balanced literacy? *(RQ 3: What literacy components and literacy structures do teachers emphasize?  RQ 4: Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement?)*

6)  What would you describe as the pros and cons of balanced literacy?  What would you identify as the strengths and weaknesses for the district's balanced literacy implementation?

7) In utilizing balanced literacy, how do you monitor student learning?  What have you noticed about your students' reading achievement?  *(RQ 5: How do teachers perceive balanced literacy to impact student achievement?)*

8) Based on your students' reading achievement, what are your perceptions of balanced literacy?

9) After attending the district's training in balanced literacy, how did the professional developments affect your teaching practices?  Please explain.

10) What professional development and guidance are needed to further support the implementation of balanced literacy?

Appendix K: Balanced Literacy Observation Protocol

Participant: ___   Date: _____   Time: _____        School: _____

| Balanced Literacy Components | Teacher Moves | Student Moves | Time Allotted | Order in Lesson |
|---|---|---|---|---|
| Read Aloud | | | | |
| Word Study | | | | |
| Shared Reading | | | | |
| Guided Reading | | | | |
| Independent Reading | | | | |
| Writing | | | | |

Appendix L: Focus Group Protocol

The focus group protocol includes the same ten questions used in the one-on-one interviews. We will re-address the questions and probe in order to analyze the themes that emerge from the interviews and observations. Again, the guiding research question is "What are teachers' perceptions of the balanced literacy framework in regards to increasing third-grade students' reading achievement?" The research sub questions are as follows: 1) How do teachers define balanced literacy? 2) How does the balanced literacy framework guide reading instruction? 3) What literacy components and literacy structures do teachers emphasize? 4) Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement? 5) How do teachers perceive balanced literacy to impact student achievement?

Thank you for participating in the study. As a part of the data collection process, a focus group discussion will be carried out, in which you will respond to the following questions. Responses will be audio recorded and transcribed. The focus group data is confidential and the participants' names will not be disclosed in the study. You will receive a transcribed copy of the discussion data to verify the accuracy of the information you provided.

Questions:
1) What is your definition of balanced literacy? *(RQ1: How do teachers define balanced literacy?)*
> ***What resources has the district provided to continue your ideas about balanced literacy?***

2) How would you describe each of the following components: a) read aloud, b) word study, c) shared reading, d) guided reading, e) independent reading, and f) writing? *(RQ1: How do teachers define balanced literacy?)*

***In which of these components do you notice constructivists' influence?***

3) How have you implemented balanced literacy into your classroom? How does the district's balanced literacy framework guide your reading instruction? *(RQ 2: How does the balanced literacy framework guide reading instruction?)*
***How is this different from what you have previously done?***

4) What balanced literacy components and literacy structures do you use? Are any of these components more critical to literacy development than the other? *(RQ 3: What literacy components and literacy structures do teachers emphasize? RQ 4: Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement?)*
***Why are these structures and components important?***

5) How do you decide how much time to designate for each component of balanced literacy? *(RQ 3: What literacy components and literacy structures do teachers emphasize? RQ 4: Which components of balanced literacy do teachers perceive as most essential to increasing reading achievement?)*
***Do you think the district's balanced literacy instructional framework adequately distributes the instructional time? Which component should consume most of the instructional time?***

6) What would you describe as the pros and cons of balanced literacy? What would you identify as the strengths and weaknesses for the district's balanced literacy implementation? *(RQ 5: How do teachers perceive balanced literacy to impact student achievement?)*

***What challenges did you experience in implementing balanced literacy? What factors would have to successful implementation of balanced literacy.***

7) In utilizing balanced literacy, how do you monitor student learning? What have you noticed about your students' reading achievement? *(RQ 5: How do teachers perceive balanced literacy to impact student achievement?)*

***What factors associated balanced literacy could be attributed to the gains in students reading achievement?***

8) Based on your students' reading achievement, what are your perceptions of balanced literacy? *(RQ 5: How do teachers perceive balanced literacy to impact student achievement?)*

***Probing based on emerging themes from interview and focus group.***

9) After attending the district's training in balanced literacy, how did the professional developments affect your teaching practices?  Please explain.

*What was the greatest impact balanced literacy had on your teaching practices.*

10) What professional development and guidance are needed to further support the implementation of balanced literacy?

*How would you prioritize the professional development needed?*