TEACHER EXPERIENCES IN ELEMENTARY WORD STUDY INSTRUCTION:

A PHENOMENOLOGICAL STUDY

by

Gregory Stephen Mihalik

Liberty University

A Dissertation Presented in Partial Fulfillment

Of the Requirements for the Degree

Doctor of Education

Liberty University

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ABSTRACT

The purpose of this phenomenological study was to describe the experience of integrating word study spelling programs for second grade teachers across six elementary schools in Northern Virginia. Word study is a developmental spelling approach that can be used by teachers to differentiate instruction and meet student needs. Despite the growing popularity of the program and increased classroom application, many schools nationwide continue to use memory-based traditional methods. Based on a review of the word study literature, the study sought to describe the experience of second grade teachers implementing word study spelling instruction in their classrooms. This study explored the challenges, successes, practices, and student growth of the word study program. A transcendental phenomenological approach was used to interview and observe 19 teachers over 18 weeks (two marking periods) as they began the school year teaching word study. Phenomenological analysis identified three common themes across schools focusing on time and group management, transfer of skills, and professional development. Implications for the research suggested value in team collaboration, multi-faceted and in-depth professional development and the integration of word study skills across the curriculum. Recommendations for future research could broaden to other grade levels, geographic locations and studying the impact of professional development and teacher collaboration options.

Keywords: alphabet knowledge, developmental, diagnostic assessment, differentiated instruction, morphological, orthographic, phonological awareness
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Dedication/Acknowledgements

This dissertation is dedicated to my Lord and Savior Jesus Christ, who gave me the motivation to pursue my doctoral degree and assisted me during each step in the process. I also, dedicate this work to the tirelessly working elementary educators who strive to meet the needs of their students. Despite limited time and resources, these teachers remain committed to the children in their classrooms. The purpose of this work is to support their efforts and overcome obstacles hindering their instructional mission.

This work is also dedicated to my amazing family, who have been my support and motivation throughout this process. As a fellow educator, my wife has been my partner during this journey, sharing my belief in the great value of education. My daughters Melanie and Sienna are the inspiration for my work, because I seek the best education for them, as I did for all of the students I have taught.

Finally, I dedicate this work to professors who have taught me across my graduate career. I learned so much throughout my courses, aiding both my research and my work as a professional. For my graduate committee, I owe special thanks, because your thoughtful critique and guidance made my study a reality. Serving as my chair, Dr. Park was a consistently positive, responsive, and guiding force during my research. Dr. Riley, Dr. Lannom, and Dr. Yocum, all served a critical role in shaping this work. It has been a pleasure to work with such a knowledgeable group of talented individuals.
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List of Abbreviations

Collaborative Learning Team (CLT)

English Language Learner (ELL)

Every Student Succeeds Act (ESSA)

Individuals with Disabilities Act (IDEA)

Institutional Review Board (IRB)

Learning disability (LD)

No Child Left Behind (NCLB)

Northern Virginia Public Schools (NVPS)

Phonological Awareness Literacy Screening (PALS)

Professional Development (PD)

Specific language impairment (SLI)
CHAPTER ONE: INTRODUCTION

Overview

In May 2012, the Scripps Spelling Bee Final was watched by an average audience of 1.06 million viewers (TV by the Numbers, 2012), which was the largest ever audience for a spelling bee in cable television history. Broadcast on the sports network ESPN, the contest has become a widely viewed event over the last 10 years and a popular social media event on Twitter (Bloom, 2014). Although this spelling competition is recognized for its entertainment value, its worth is tied to the unique skills of talented students, rather than a widespread focus on spelling for school systems.

The Scripps Spelling Bee program outlines specific guidelines for schools to conduct their own events and prepare students for competition. Following registration, students are provided with 100-word grade level lists, followed by a cumulative 450-word school list, and finally access to a 1,150-word website with lists divided by language of origin (Scripps National Spelling Bee, 2016). Following a period of study at home, classroom competitions are then held to determine winners to compete in schoolwide events. The resulting school winners then meet in a local spelling bee in which the champion qualifies to compete in the Scripps National Spelling Bee near Washington, DC. Reflecting on the overall value of the Scripps program, an implicit message is sent that spelling is a competitive endeavor that is worthwhile for only a select few. Students are singled out at the classroom, school, and regional level as talented spellers, while the vast majority of the school population is disregarded. In addition, the study approach to the program relies on basic word lists for memorization without purposeful activities. These words are not addressed in classroom instruction, but rather the spelling content is delegated as optional homework for students to memorize during their personal time. Spelling
in this regard is equivalent to an extracurricular activity, which is not required nor assessed, but rather an optional fun competition. This perspective has been echoed by teachers, who in Johnston’s (2001) research into teacher viewpoints on spelling, 73% felt the elementary curriculum did not adequately support spelling and 74% of teachers were concerned with the regressing spelling abilities of students progressing into the future.

Connectedly, this lack of emphasis on schoolwide spelling is evident in educational standards, such as the nationally recognized Common Core State Standards Initiative (National Governors Association Center for Best Practices & Council of Chief State School Officers, 2010), and state English benchmarks including the Virginia Standards of Learning (Virginia Department of Education, 2010). Neither of these curriculum frameworks includes spelling components in their language arts assessments, instead relying on multiple-choice tests that concentrate predominantly on reading comprehension. Overall, spelling is not a subject being provided with adequate recognition and value in the American classroom (Crittenden, 2013; Gentry, 2004). This misperception of the public limits spelling to the concepts of memorized word lists for homework and mundane classwork activities. Reflecting on the history of spelling, many adults over the 20th century experienced basal spelling programs and repetitive spelling lists as children (Schlagal, 2002). In contrast, spelling should be viewed as a critical component of overall literacy instruction that includes oral speaking, reading, and writing.

Literacy instruction is of paramount importance at the elementary level as students are commonly learning the fundamental skills to communicate and comprehend. Oral language skills for discussion and basic writing fluency are essential for students to effectively share ideas. In addition, teachers are under pressure to find solutions to student reading difficulties (Allington, 2002). Reading is the fundamental method for students to input information across
subject areas, whether they are reading a fantasy novel for entertainment, or studying the water cycle in a science textbook. Within the intricate process of reading, young students must balance word decoding, reading fluency (rate and expression), and content comprehension. All three of these areas are directly connected to word knowledge, through phonetically sounding out words, reading words with automaticity (sight words), and comprehending challenging vocabulary. To address these skills instructionally, word study presents an approach applicable across elementary grade levels (PreK-6th) for students with a range of abilities (Ganske, 2000; Invernizzi, Templeton, & Johnston, 2000).

Word study incorporates the ability for students to accurately spell words, decode words when reading, and expand the breadth and depth of their vocabulary. As prescribed by *Word Journeys* author, Kathy Ganske (2013), primary age students (PreK-1) in the Emergent and Letter Name stage benefit from sorting pictures assorted with sounds as they first build automaticity with consonants, scaffolding their initial attempts to read and write. Students transitioning to the Within Word stage in Grades 1-3 benefit from the comparing and contrasting of new words (Ganske, 2013) to expand their vocabulary beyond basic words. For example, students can progress to writing “huge” instead of “big” or “sprint” instead of “run” to communicate with more accuracy. In the higher levels of word study, student awareness of prefixes, suffixes, and base words can be highly beneficial to decode and understand complex new vocabulary during content studies. For instance, following study at the Syllable Juncture stage (typically Grades 3-6) and Derivational Constancy stage (Grades 5+) of word study (Ganske, 2013), students studying geometry could comprehend perimeter by identifying that “peri” means “around” and that “pent” refers to “five” in the word pentagon.
Word study instruction is multifaceted and incorporates building an understanding of alphabetics, phonetics, word patterns, and meaning units (Henry, 1996). This program includes a kindergartener recognizing rhyming words, a second grader spelling the word “cake” with magnetic letters, and a fifth grader recognizing that the Greek root word “phob” means “fear.” Designed for all elementary school students, word study meets inclusive classroom expectations for differentiation set by the Individuals with Disabilities Education Act (IDEA, 2004). For instance, within a single elementary classroom, it would not be unusual to find four groups of students engaging in different word study activities under the guidance of their teacher. A portion of students could be found sorting a list of 25 words into columns based on their initial consonant blend sounds (e.g. /skl/, /shl/, /scr/, /shr/), meanwhile another group of advanced readers could be engaged in word hunts with independent book choices to find plural words with matching word ending features (e.g. -ys, -ies, -ves). Concurrently, a different group of students could use speed sort activities to competitively race with partners to build automaticity with compound words, while a teacher meets with a small group of beginning readers to teach a word sort matching the consonants “t,” “n,” and “p” with picture representations. For all of these groups, a teacher can introduce the critical skills and scaffold their growth, but the process of planning and delivering this instruction can be challenging. Teachers face instructional obstacles at the classroom (e.g. student interest), school (e.g. administration support), and district level (e.g. school board funding), but a true understanding of what teachers experience has not been studied. Research has yet to gather data summarizing the word study process and how teachers address the challenges they face and reflect on their students’ successes.

The following research study sought to explore the teacher experience of implementing word study in a range of classroom environments. Through a phenomenological study, insight
could be gained regarding the word study process and determine the challenges faced by teachers that may be common across classrooms. Spelling instruction should not be assumed to be simple or straightforward; otherwise methods of instruction would not be so readily debated. Quoting author and expert in linguistics, Guy Deutscher (2010), “Really, it is unfair to say that English spelling is not an accurate rendering of speech. It is – it's only that it renders the speech of the 16th century” (p. 53). Modern-day spelling for such a complex and evolving language requires research-based methods, which the logical and developmental word study program can provide. Chapter one of this research will explain the background of the study and situation to self, along with the specific purpose statements and research questions, and finally the delimitations, limitations, and definitions that will encompass the study.

**Background**

As a sub-skill of literacy, spelling ability has been identified as an area warranting differentiated instruction. Students do not learn spelling at random, rather through qualitative changes in understanding that progress from general alphabet knowledge to complex meaning units (Masterson & Apel, 2010). Even during early development, children utilize multiple sources of linguistic knowledge at the phonetic (sound) and morphological (meaning) levels to decode words (Masterson & Apel, 2007). Despite this complexity, spelling had not been recognized throughout the history of education for its linguistic importance.

Over most of the twentieth century, spelling in American schools had been viewed as separate literacy skill addressed through scripted basal programs (Schlagal, 2002) and lengthy word lists for memorization (Hanna, Hodges, & Hanna, 1971). Traditional spelling instruction applied a uniform list of words that all students in a class memorized and recalled in writing on a weekly basis (Schlagal, 2002). Following research in literacy instruction and student learning,
educators identified a more logical progression of spelling knowledge (Venezky, 1967) and the uniqueness of child development in orthographic knowledge (Hughes & Searle, 1997). Furthermore, based on trends in differentiated reading instruction (e.g. guided reading and writing workshop), researchers identified the benefits of varying spelling instruction to the developmental levels of students (Morris, Nelson, & Perney, 1986; Schlagal & Trathen, 1998). These findings suggested that the uniqueness and complexity of student spelling growth warranted diagnostic assessment and differentiated instruction.

In response to research, word study programs and assessments were developed in the early 2000s by education researchers such as Kathy Ganske (2000), Marcia Invernizzi (2003), and Donald Bear (Bear & Templeton, 1998). These initiatives recognized the uniqueness of student sound, pattern, and word understanding, while they also addressed the developmental process of learning how to spell. Developmental approaches such as *Words Their Way* (Bear, Invernizzi, Templeton, & Johnston, 2011) and *Word Journeys* (Ganske, 2013) approached spelling similarly to guided reading, allowing teachers to group students based on similar needs for instruction. Furthermore, students could be scaffolded at their instructional level through weekly activities to work towards individual growth and build confidence in their literacy. Overall, word study presented an active and inquiry-based process for teachers to meet the instructional needs of their students. Despite these research-based advantages and nationally published programs, teachers have demonstrated hesitancy toward implementing word study in their classrooms.

In national studies of teacher practices, the majority of teachers continue to utilize basic spelling programs with traditional word lists (Covault, 2011; Fresch, 2003). Also, the classwide distribution of word lists for memorization on a weekly basis remains common (McNeill & Kirk,
2014), despite findings presenting the need for differentiation (Hughes & Searle, 1997), active engagement (Ganske, 2013), and developmental curriculum (McQuirter, 2007). Multiple potential factors could contribute to this stagnancy in spelling instruction, including teachers not implementing reflective teaching practices that analyze learning outcomes (Brownell, Lauterbach, Dingle, Boardman, Urbach, & Park, 2013) and/or a lack of professional development in literacy instruction (Anderson & Standerford, 2012). Likewise, standardized curriculums such as the Common Core State Standards or the Virginia Standards of Learning can apply pressure toward different subject areas that detract from spelling instruction.

Furthermore, school or district variables such as available resources, community socioeconomic status, and school system policies can all be influential. Regarding resources, if schools lack word study materials, teachers may not be able to implement activities or practices. Even when available, if resources are limited and must be shared, teachers may prefer to take different spelling approaches. In terms of socioeconomic status, the educational experiences and literacy philosophies of the community may influence the parents’ and guardians’ receptiveness to word study instruction.

School system policies are also heavily influential, if requirements are put in place for specific resources or teaching practices that conflict with the word study program.

In order to sort through all of these factors, research must focus on the experience of teachers in the classroom. Qualitative research using a phenomenological approach could draw valuable conclusions about the experiences of teachers, revealing the challenges they face regarding word study implementation. Through a phenomenological study with different school environments, multiple teachers can seek to identify commonalities that exist, despite numerous variables. The potential findings would be valuable to the school community, enabling planning
of school programs and the allocation of resources to address the true situation teaching word study at the elementary level.

**Situation to Self**

As an elementary teacher and word study facilitator, I have interacted with hundreds of teachers over the years. I have listened to their classroom stories about teaching spelling and vocabulary through the word study approach. Based on their teaching styles, school context, and student needs, their implementation of word study have progressed uniquely. Some teachers experienced a smooth integration of the program into their daily practices, while others faced major obstacles that prevented effectiveness, such as administrator roadblocks, or a lack of instructional time. Based on these different anecdotal stories, I seek to study the full experience of multiple teachers and find common themes to share with the educational community.

When planning this study, ontological, epistemological, axiological, and methodological assumptions in philosophy were evaluated (Creswell, 2013). The ontological issue relates to the nature of reality, addressed by reporting multiple perspectives in the study. Themes will be evaluated based on the interviews of teachers and commonalities in experiences. The epistemological and methodological beliefs were addressed through a combination of authentic data, such as teacher and student quotes, along with writing samples and classroom observations. My values as the educator-researcher are revealed through my application of balanced literacy instruction and use of the word study developmental program. Along with the school community, my values strongly support increased student achievement.

As a qualitative researcher, my approach to research was guided by my interpretive framework or perspective. In fact, according to Denzin and Lincoln (2011), my philosophical assumptions previously outlined are embedded within my interpretive framework and guided by
my interpretive lens. Listed by Creswell (2013), numerous categories exist including interpretivism, positivism, postpositivism, constructivism, hermeneutics, and others. Based on my experience and beliefs, my research perspective most closely aligns with the constructivist framework. The constructivist approach, as summarized by Creswell (2013), Crotty (1998), and Schwandt (2007), seeks to understand the world, while recognizing the subjectivity and complexity of experience. The goal of research was to generate a theory or describe an experience through collecting data. As an educator, the goal of my study was to observe and understand school experiences to provide actionable data for school improvement.

Over 11 years of teaching, my instructional time has predominantly concentrated on literacy instruction, which directly connects with my constructivist views. I greatly admire the breadth and depth of the work by developmental psychologist and constructivist, Jean Piaget, whose research into the stages of infant development recognized the ongoing cognitive growth of children as they build an understanding of the world (Piaget, 1936; 1957). Literacy skills develop in a similar stage progression, yet occur individually for each child and at different rates. From the constructivist standpoint, as outlined by (Lincoln & Guba, 1989), literacy development is a context dependent phenomenon that cannot be addressed through a cause and effect approach to teaching. Vygotsky’s zone of proximal development (1980) insists that teachers must meet children with their instructional methods in order for them to learn and grow.

The pragmatism worldview shaped this study, because the focus is on “what works” for students to achieve in the current public school environment. This matches the pragmatic theoretical definition of Patton (1990), which states that the outcomes of a study should be emphasized, rather than the conditions or process to reach those outcomes. This solutions-based framework looks toward the overall situation, actions taken, and consequences of research that
can be associated with different philosophical approaches. Thus, this study sought to pragmatically analyze how teachers adapt instruction to meet student needs, while facing unique situations and obstacles.

**Problem Statement**

Research-based practices for literacy instruction have become a requirement in public education as influenced by past federal legislation such as No Child Left Behind (NCLB, 2002) and the Individuals with Disabilities Education Act (IDEA, 2004), as well as the passage of the Every Student Succeeds Act (ESSA) in 2015 (U.S. Department of Education, 2016). Based on these regulations, teachers must meet the needs of all learners with student-centered curriculums, which include spelling and vocabulary instruction. Classwide word lists are outdated, as research shows explicit, meaning-based, word knowledge instruction is more beneficial than memorization (Henderson, 1990; Williams, Phillips-Birdsong, Hufnagel, Hungler, & Lundstrom, 2009). For example, in a controlled experiment with second grade students (Hilte & Reitsma, 2011), scores were five percent higher for students who learned phonetic spelling skills connected with meaning, compared to neutral phonics teaching. These differences were present for the second graders both immediately following instruction and a month later (six percent higher). Furthermore, demonstrating the unique needs of students across the classroom, 80% of students with typical development comprehended all graphemes, while only 20% of students with specific language impairments (SLI) achieved mastery, demonstrating the evidence of spelling delay (Cordewener, Bosman, & Verhoeven, 2015).

Despite traditional spelling instruction’s ineffectiveness, the majority of teachers continue to use these routines in their elementary classrooms (Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014). The hesitancy of teachers to change instruction could be due to lack of professional
development and understanding of new programs. In surveys and interviews of preservice teachers, responses have shown they feel unprepared for effective literacy instruction (Carreker, Joshi, & Boulware-Goode, 2010). In contrast, when teachers have an understanding of student spelling development and invented spelling patterns, they can design effective word study lessons for their students (Bear & Templeton, 1998).

Word study can potentially address the individual needs, but despite the nationwide implementation and published supportive research (U.S. Department of Education, What Works Clearinghouse; 2013), conclusive data demonstrating the effectiveness or ineffectiveness of the word study program could not be found. This lack of definitive research warranted further analysis of word study instruction. Conducting phenomenological research can potentially reveal how teachers implement word study and identify common challenges and solutions to promote student achievement. With the assistance of the research community, a description of teacher experience using word study would be beneficial to enhance dialogue between school professionals to improve practice.

**Purpose Statement**

The purpose of this phenomenological study was to describe the experience of integrating word study spelling programs for 10-15 second grade teachers across six elementary schools in Northern Virginia. Phenomenological research sought to describe how teachers promoted spelling development and identify their common instructional challenges and solutions. Spelling development was defined as the phonics, spelling, and vocabulary growth of students, reinforced by their weekly differentiated word study instruction.
Significance of the Study

The significance of this phenomenological study fell in the need for the educational community to understand the experiences of elementary teachers using word study. Studying teachers’ opinions and practices helped explain why outdated spelling methods were being used by many teachers (Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014) and built understanding about the unpreparedness many teachers feel about literacy instruction (Carreker, Joshi, & Boulware-Goode, 2010). The analysis of the thought process and background of teachers was insightful, considering how the literacy content knowledge of teachers facilitates their selection and interpretation of spelling words, assessments, and instructional techniques (Moats, 1994; Spear-Swerling, 2009). By allowing the voices of teachers to be heard, teachers could avoid pedagogical obstacles through awareness, rather than making corrections following mistakes. Furthermore, by listening to the thoughts and perspectives of teachers, school systems could take actions to shift the dynamics that discourage word study practices. This could include enhancing alignment of professional development and instructional resources to meet the needs of teachers implementing word study.

Word study provides a method for improving morphological awareness (Cordewener, Bosman, & Verhoeven, 2015; Hilte & Reitsma, 2011), while addressing the qualitative stages of spelling development (Masterson & Apel, 2010). By improving spelling and vocabulary instruction through differentiated practices such as word study, student achievement could be promoted for all students. Word study reaches across language arts subjects, including reading, writing, spelling and oral language as students build their phonological, morphographic, and orthographic knowledge. Through this phenomenological study, the experiences of teachers

were better understood to support teachers as they transition from ineffective traditional spelling instruction to research-based developmental word study instruction.

**Research Questions**

In this study, the central research question sought to explore why teachers felt inadequate conducting literacy instruction (Carreker, Joshi, & Boulware-Gooden, 2010) and why many continued to utilize outdated spelling practices (Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014), despite ineffectiveness (Andrews, Torgerson, Beverton, Freeman, Locke, Low, Robinson, & Zhu, 2006). The central research question was as follows: What are the experiences of second grade elementary teachers implementing word study (Ganske, 2013) spelling instruction in their classrooms?

Recognizing the complexity of literacy development and the unique dynamic of each elementary classroom, sub-questions explored implementation factors for teachers and the resulting student outcomes. Exploring the teacher perspective was relevant, considering teacher reflection was necessary for successful literacy program implementation (Brownell, Lauterbach, Dingle, Boardman, Urbach, & Park, 2013). The following sub-questions guided the study: (a) What are the common word study instructional challenges faced by teachers? (b) What instructional methods for word study are successful for teachers? (c) How do teachers address their word study instructional challenges? (d) What do different forms of administrator and student feedback suggest about teachers’ word study instruction? (e) How do teacher experience and professional development background influence word study instruction?

**Research Plan**

Research was conducted as transcendental phenomenology as described by Moustakas (1994) through studying the phenomenon of teacher implementation of word study spelling
programs across elementary classrooms. This design was appropriate to highlight the positive and negative commonalities of the experience, despite the uniqueness of every classroom. The epoche approach, as described by Moustakas (1994), guided my approach as a researcher. Based on its Greek definition, epoche refers to abstaining from judgement and observing with objectivity (Husserl, 1931). Humans naturally have a perspective influenced by past experiences and feelings, which is why the purposeful self-awareness of the epoche approach is important. I aimed for objectivity by bracketing out my perspective, because my experience as a teacher could influence my interpretation. I journaled to reflect as a researcher throughout the process and review my notes to identify any potential bias. In addition, prior to data collection, I wrote an accurate, detailed, and self-analytical review of my experiences as an educator to fully document my background.

A transcendental phenomenological study was the best approach to analyze the word study instructional experience to identify the common themes across different teachers, classrooms, and schools. A phenomenology provided in-depth analysis with multiple forms of data over an extended period of time, which was warranted to describe the uniqueness of elementary instruction in authentic classrooms. Data analysis followed the Moustakas (1994) approach removed my personal bias and determined common meaning through horizontalization, clustering, and thematizing, which provided a collective “essence” or universal experience that was informative to the education community.

Data were collected from a sample of 19 second grade teachers over the course of 18 weeks. The teachers were recruited from the same large school system in Northern Virginia, but selected from schools with different socioeconomic backgrounds (urban, rural, and suburban). Teacher interviews explained the goals of instruction, which were compared with administrator
interviews discussing teacher word study practices. Planned observations of word study lessons gave authentic views of instruction, which were supplemented with student artifacts, such as writing samples and spelling assignments. Administrator interviews also provided alternative perspectives to teacher opinions.

**Delimitations and Limitations**

The delimitations of the study specified the sample group and instructional method to provide more clarity to the results. Although word study is a program with wide applicability and is commonly implemented in Grades K-5, this study was delimited to only second grade. The experiences between teachers were more comparable by focusing on a single grade, recognizing enough variation existed through different school contexts and student needs. Second grade was selected because students in this level demonstrate overall a wider range of spelling levels compared to other grades, which is outlined in the continuum of the *Words Their Way* program (Bear, Invernizzi, Templeton, & Johnston, 2004). According to *Words Their Way*, second grade extends from the late Letter Name stage through early Syllables and Affixes stage, which is the widest range per grade level for the program. In the younger Grades PreK-1, student levels cluster between the Emergent stage and the Letter Name stage as outlined by Ganske (2013), focusing on simple consonants, blends (e.g. /sl/ in “sled”), digraphs (e.g. /sh/ in “ship”), and short vowel sounds (e.g. “cap”, “top”, “sip”). In the higher Grades 3-5+, students shift toward the more advanced meaning-based levels, including the Syllable Juncture stage concentrating on multiple-syllable words and their stresses (e.g. “silent”, “tennis”, “trample”), followed by Derivational Constancy stage studying Greek and Latin roots with prefixes and suffixes to understand word meaning (Ganske, 2013).
The study was also delimited to general education teachers, because the phenomenological experience addressed the challenge of implementing word study instruction with a full class of students with varied needs, while coordinating other aspects of the school curriculum (e.g. math, science, health, etc.). A study involving only reading specialists or phonics tutors would have been studying different and more context-specific situations. Research with these groups could have been worthwhile, but would have been too broad to include in this study.

Regarding instructional practices, word study referred to the approaches outlined in *Word Journeys* by Kathy Ganske (2013) and *Words Their Way* by Bear, Invernizzi, Templeton, and Johnston (2011). Teachers may implement their own variations of spelling and vocabulary instruction and the term “word study” can have different interpretations, but this study focused on these two commercially published and well-established programs. The two programs have very similar elements and blended approaches of *Word Journeys* and *Words Their Way* will be accepted for analysis in this study. Finally, all teachers in the study had some form of professional development or coursework in the area of word study. This established a basic level of understanding for all teachers, which enabled a more in-depth exploration of word study beyond basic program organization and provided consistency across participants.

The study was limited by its setting and the length of the study. Research was conducted in the Northern Virginia region, limiting generalizability to other areas in the United States. Despite a single geographic location, the region presented rural, suburban, and urban conditions that was incorporated into the sample to represent a broad population. In addition, the study was conducted with a single public school system, which provided consistency for the study, but reduced generalizability to other structures such as charter or private.
Finally, the study was conducted over an 18-week period (two marking periods), which limited the opportunities to observe longer-term growth for students. Although beneficial to follow student development over a full school year or multiple years, a longer-term study was not critical to gain an understanding of teacher experience or observe student growth in spelling.

Definitions

1. Developmental instruction – An approach to curriculum and instruction that identifies the process that continues over the course of a person’s lifetime in which people progress at different rates, although following a similar order of skills (Masterson & Apel, 2010; Schlagal, 2002; Venezky, 1967). Regarding word study, spelling skills are acquired in a systematic order, advancing from alphabet knowledge, through spelling patterns, and eventually more complex meaning patterns (Bear et al., 2011; Bourassa, Beaupre, & MacGregor, 2011; Ganske, 2013; Veno Eidukonis, 2013).

2. Differentiation – Providing different learning approaches, typically in the same classroom, which addresses the unique skills, backgrounds, and learning styles of students (Anderson & Standerford, 2012; Crittenden, 2013).

3. Dyslexia – A reading disorder characterized by difficulties with fluency and comprehension. The disorder also connects to broader areas of literacy to include spelling accuracy and written communication (Carreker et al., 2010).

4. Explicit learning – Learning to reach clearly stated objectives through the direct explanation of concepts and skills. In spelling, the identification of letter sounds, common patterns, and basic spelling rules are explicit (Cordewener et al., 2015; Critten, Pine, & Messer, 2013; Crittenden, 2013).
5. **Heterogeneous grouping** – Placing students in a mixed-level group for classroom instruction enabling balanced collaboration with a range of skills (Ouellette, Sénéchal, & Haley, 2013).

6. **Homogeneous grouping** – Placing students in a same-level group for classroom instruction allowing teachers to plan targeted instruction toward similar needs (Covault, 2011).

7. **Implicit learning** – Learning where goals are not clearly stated and students make natural connections and personal understandings. In spelling, students learn to identify commonalities between words and similar meanings to spell unknown words and enhance vocabulary (Critten, Pine, & Messer, 2013; Cordewener et al., 2015).

8. **Instructional level** – An approach to teaching that directs the content and method to the student’s learning level. Applicable across subject areas, the instructional level includes leveled approaches to guided reading instruction (Fountas & Pinnell, 1996) and leveled texts (Pressley, 1998). For word study, the concept describes the “use but confuse” level, where students are familiar with a spelling sound, pattern, or meaning unit, but they are applying the concept inconsistently or inaccurately in writing (Bear et al., 2011; Carreker, Joshi, & Boulware-Gooden, 2010; Invernizzi, Abouzeid, & Gill, 1994).

9. **Morphological knowledge** – An understanding of the meaningful relationships among words, including the spelling of morphemes (smallest units of language meaning) (Bahr, Silliman, Berninger, & Dow; 2012; Berninger, Abbott, Nagy, & Carlisle, 2010; Bourassa, Beaupre, & MacGregor, 2011; Critten, Pine, & Messer, 2013; Franklin-Guy & Scudder, 2011; McNeill & Kirk, 2014; Mullock, 2012; Veno Eidukonis, 2013).
10. **Multimodal** – Involving multiple modalities, intelligences, or sensory stimulation (Veno Eidukonis, 2013).

11. **Orthographic knowledge** – Information stored in a student’s memory that helps represent spoken language in writing. In spelling, orthographic knowledge includes hearing words orally and transferring to writing, such as a spelling test (Bahr et al., 2012; Berninger et al., 2010; Franklin-Guy & Scudder, 2011; Hilte & Reitsma, 2011; Veno Eidukonis, 2013).

12. **Phonological knowledge** – An individual’s awareness of the phonological structure of spoken words, including the spelling of phonemes (smallest units of sound that can differentiate meaning) (Bahr et al., 2012; Berninger et al., 2010; Cordewener et al., 2015; Franklin-Guy & Scudder, 2011; Hilte & Reitsma, 2011; McNeill & Kirk, 2014; Veno Eidukonis, 2013).

13. **Qualitative spelling growth** – Changes in overall understanding of spelling concepts including sound, pattern, and meaning. Includes comparing and contrasting words in terms of spelling and definitions, which improves vocabulary understanding (Cordewener, Bosman, & Verhoeven, 2012).

14. **Quantitative spelling growth** – Changes in spelling accuracy in terms of identifying letters and spelling words correctly (Cordewener et al., 2012).

15. **Self-efficacy** – The strength in student’s belief in his or her own learning ability. This personal perception connects to a student’s confidence to reach goals and complete tasks, which includes effort, commitment, and persistence when facing adversity (Bandura, 1977; 1982).
16. *Specific language impairment (SLI)* – A type of speech and communication need that makes it difficult to talk and understand language. Students with SLI are usually as healthy as their peers in other ways, but struggle with language use and comprehension (Cordewener et al., 2012).

17. *Word study* – A differentiated and developmental instructional approach that integrates phonics, spelling, and vocabulary. Word study teaches students through hands-on, active exploration of words to discover patterns and conventions of English orthography (Bear et al., 2011; Ganske, 2013).

18. *Zone of proximal development* – A concept proposed by Lev Vygotsky (1962; 1978; 1980) describing the learning ability of a student, which can be achieved through the scaffolding of a more advanced teacher. This learning level is the potential for growth a person can achieve with appropriate instruction, which is a relevant goal for educators.

**Summary**

In chapter one, the purpose and background of this study was established within a specific real-world context. The public demand for research-based literacy programs in schools and the uncertainty of teachers to utilize more effective spelling and vocabulary programs presents a need for research. A phenomenological study of the experiences of classroom teachers provided insight to the successes and obstacles of word study instruction, which when shared, could benefit the broad educational community throughout the United States.

Although this study sought common themes, it was limited to only second grade teachers in a single school system in Northern Virginia. Despite limitations, the different types of schools researched and the commonalities between elementary school grades provided useful information that added to the education research community. Next, chapter two will present a
literature review describing the research associated with word study and explain the gap in the literature this study addressed.
CHAPTER TWO: LITERATURE REVIEW

Overview

Well before the high cable television ratings for the Scripps Spelling Bee or the first publication of *Word Journeys* (Ganske, 2000), spelling has been an important component of the American school experience (Schlagal, 2002). Dating back to the 19th century, spelling has been a consistent aspect of compulsory education (Schlagal, 2002), while evolving in process and purpose. Although this qualitative study seeks to investigate the word study experience, the history of this program is not limited to the past 20 years or to classroom spelling research. Word study instruction is present in multiple studies in education, including the topics of vocabulary development (Beck, McKeown, & Kucan, 2013), the writing process (Calkins, 2003; Gibson, 2008), diagnostic assessment (Masterson & Apel, 2010), phonological awareness (Critten, Pine, & Messer, 2013), professional development (Anderson & Standerford, 2012; McNeill & Kirk, 2014), and differentiated instruction (Kelman & Apel, 2004). Even though elements of word study instruction were evident in these sources, they had a range of purposes and none of them provided a comprehensive analysis of the program.

In word study research, some of the studies concentrated on evaluating student spelling needs (Masterson & Apel, 2010), while others observed methods of small group instruction (Gibson, 2008). Certain authors studied early literacy levels that addressed alphabet knowledge (Kelman & Apel, 2004), while some researchers worked with older students seeking to expand vocabulary knowledge (Beck, McKeown, & Kucan, 2013). The following literature review draws connections across numerous studies to gain further insight about the word study experience in the classroom setting. The review begins by describing the history of spelling,
word study, and language development, followed by an analysis of key themes that demonstrated a need for further research in word study instruction.

**Theoretical Framework**

The theoretical basis of this research study is based on changing practices in spelling over time, developments in word study and theories of language development. Over the last 200 years, spelling has evolved considerably based on the trends in education and research developments (Hughes & Searle, 1997; Nelson, 1989; Schlagal, 2002). Word study became more prominent in the last 50 years (Bear et al., 2011; Ganske, 2013), following research into constructivist learning (Lincoln & Guba, 1989; Piaget, 1957) and language development (Chomsky, 1989). The research into spelling, word study, and other vocabulary methods are outlined in the following theoretical framework.

**History of Spelling Instruction**

From its first introduction in American schools, spelling instruction has undergone significant changes as a component of the curriculum. Through the 1800s, spelling was valued as a separate content area for emphasis with a direct connection to success in reading (Venezky, 1999). In the twentieth century, spelling became a subset of overall literacy instruction with less emphasis than reading and writing (Flaherty, 2013). Over the last century, the goals and scope of spelling continued to change, beginning as a scripted component of basal programs (Schlagal, 2002), followed by a traditional word list approach (Henderson, 1990), and more recently a movement toward differentiated and developmental programs for all students (Hughes & Searle, 1997; Schlagal, 2002). Researchers also studied the influence on content area vocabulary studies (Schlagal, 2002) and spelling taught through implicit proofreading practice (Henderson, 1981). The following section summarizes the changes over time of American spelling instruction.
**Basal spelling programs.** The origins of spelling programs in the United States can be traced back to the basal spelling books in the late eighteenth century, such as elementary spelling books written by Noah Webster, a traditional schoolteacher in Goshen, New York (Nelson, 1995). His original 1783 publication was printed with a blue paper cover and included grammar, spelling, and pronunciation concepts (Nelson, 1995). After multiple variations and editions, the permanent title was issued as The *Elementary Spelling Book, Being an Improvement on the American Spelling Book* (Webster, 1857), but the title was commonly referred to in schools as the “Blue-Backed Speller.” During the first 100 years that the “Blue-Backed Speller” was in publication, estimates have approximated that over 100 million copies were sold, demonstrating the long-lasting and wide influence of the textbook. Lessons in Webster’s textbook utilized a sentence reading and writing method to teach spelling. Students studied lengthy lists of words (sometimes 50+) that accompanied reading passages and grammar lessons (Schlagal, 2002). These basal spelling books incorporated pronunciations and definitions with the words, but were not differentiated based on the developmental skill or age of the students (Schlagal, 2002). Spelling and vocabulary development were essentially viewed as an accumulation of words over time, which necessitated a steady introduction of challenging words to achieve higher levels of literacy. The Blue-Backed Speller also introduced a broader American curriculum. The content of these lessons taught American morals, economics, and politics, which promoted patriotism of the new nation following the American Revolution (Commager, 1958). Overall, the basal spelling programs outlined a comprehensive curriculum for teachers, guiding their instruction step-by-step with uniform spelling knowledge for all students.

**Early memory-based spelling lists.** Spelling instruction eventually shifted away from a basal reader and instead concentrated solely on spelling knowledge using word lists. In the early
1900s, these lists were lengthy (Hanna, Hodges, & Hanna, 1971) and lacked an orthographic focus, such as specific vowel sounds or comparing prefixes.

Over time with the beginnings of spelling research, educators recognized value in a more logical organization of words that presented a purpose and level of difficulty. In the 1930s, schools began to move toward spelling lists that presented the most highly-used words in the language with increasingly levels of difficulty (Rinsland, 1945). The words on these lists were presented in a progression based on frequency counts and word length (Horn, 1969). The goal of these early lists was to guarantee that students were learning the most essential words for reading and writing (Schlagal, 2002). Although words were not necessarily grouped on lists based on similarities in phonemic patterns or morphological units, these early lists did present a more leveled approach that could be applied to different grades.

**Traditional spelling practice.** Approaching the mid-century, research in literacy and spelling development influenced classroom practices to acknowledge the needs of learners (Schlagal, 2002). Rather than continuous repetition toward mastery, spelling strategies encouraged student retention of skills. The “study method” instructed students to read, pronounce, visualize, write, and check accuracy of the words to advance toward automaticity (Henderson, 1990). This more reasonable approach was in contrast to the constant repetition in earlier years, where students would write words hundreds of times to promote accuracy. This multi-modal approach better helped students create and maintain a mental representation of the words for longer retention.

Another shift in practice involved the test-study-test routine, instead of the traditional study-test weekly program. This change included a pretest given to students to determine their prior knowledge prior to weekly spelling assignments. By having students make pretests
corrections and highlight the most challenging words prior to instruction, the test-study-test approach led to the most spelling growth for students compared to other methods at the time (Horn, 1947; Reid & Hieronymous, 1963). Professionals also recognized the value in balancing known and unknown spelling features to scaffold new learning, instead of full lists of unfamiliar words (Henderson, 1990). Perhaps most importantly, the test-study-test approach revealed the differences in prior knowledge between students, suggesting a need for differentiated instruction.

**Developmental spelling instruction.** In the period of the 1950s through the 1960s, researchers and instructors placed more attention on the progression of orthographic knowledge (Schlagal, 2002). The goal was for a spelling curriculum that improved intrinsic understanding of phonemes, graphemes, and morphemes that could be generalized across different words during both reading and writing (Schlagal, 2002). Studies over this period revealed the consistency in sound, pattern, and meaning units in English orthography and the general order of the spelling system (Hanna, Hanna, Hodges, & Ruforf, 1966; Venezky, 1967). These approaches recognized that spelling instruction is a developmental process that continues over the course of a person’s lifetime in which people progress at different rates, although following a similar order of skills. In response, spelling programs became more systematic as they introduced word lists in a developmental order (Schlagal, 2002). Competence in spelling is not a simple inevitable outcome, but rather as described by McQuirter (2007), it is an iterative and complex process occurring over a lifetime.

**Differentiated spelling approaches.** Spelling research in the last 30 years has trended away from the authority of the curriculum and toward the needs of students. Studies analyzed how students developed orthographic knowledge over a broad spectrum of skills (Nelson, 1989). Research found that at the youngest ages, students were building an awareness of phonics.
sounds, followed afterward with an awareness of spelling patterns, and finally a heightened understanding of word origins and definitions. In addition, research also observed that students’ spelling errors were not random mistakes, but rather illustrated their growing knowledge over time (Henderson, Estes, & Stonecash, 1972). Also, researchers Hughes and Searle (1997) noted that students do not progress in orthographic knowledge at the same rate. Furthermore, students can struggle at certain phases in the spelling progression, while accelerating through other skills, which emphasizes the uniqueness of literacy development.

Research in the 1990s revealed many important differences in student spelling performance based on their instructional level. Even when provided with instruction and appropriate time (e.g. week) to practice, students working with words at a frustration spelling level performed poorly (Morris, Nelson, & Perney, 1986; Schlagal & Trathen, 1998). Connectedly, when teachers utilized word lists from a prior grade for instruction with below-level spellers, students progressed appreciably in their spelling knowledge (Morris, Blanton, Blanton, Nowacek, & Perney, 1995).

This awareness of the progression of orthographic knowledge aligned with an instructional focus on diagnostic assessment to determine student spelling needs (Templeton & Bear, 1992). Rather than classwide lists, spelling approaches became more individualized to meet the developmental needs of students (Henderson, 1990; Morris, 1999). The results of diagnostic assessments began to guide instructional planning and included multiple spelling lists to meet the varying needs within a single classroom. Over time, spelling programs became more detailed regarding assessments and instructional materials to scaffold students to grasp the similarities and differences between word features to improve their spelling (Bear & Templeton, 1998).
The benefits of differentiated instruction were clearly evident in the research of Morris, Blanton, Blanton, Nowacek, and Perney (1995), who studied the impact of instructional-level spelling approaches. Similar to traditional spelling instruction, the researchers analyzed how below-level spellers learning with the same word list compared to their on-level peers. The below-level spellers performed adequately on weekly spelling tests by applying strong effort to achieve temporary understanding. This level of achievement did not transfer to the long-term and/or unique contexts as students relied on memorization rather than understanding when studying their words. In contrast, students practicing spelling with instructional level words not only scored high on weekly spelling tests, but also retained understanding when spelling words in future situation. Such research presents a logical explanation of how teachers can rely on outdated traditional methods, despite research-based approaches being available. When teachers utilize memory-based traditional spelling methods, student performance can be high on weekly assessments, while masking their shallow and short-term understanding of words.

**Incidental versus explicit spelling instruction.** With the recognition of the developmental process of spelling knowledge, some researchers and educators viewed spelling growth as a natural learning process. In a review of literature, Krashen (1993) concluded most people learn how to spell words incidentally through reading, instead of direct literacy instruction. Logically, reflecting on the writing abilities of Americans today, most people spell far more words than they have ever practiced on spelling lists. In addition, many children learn how to spell accurately without any benefit of spelling instruction, questioning the need for weekly explicit lessons that consume time from the school day that could be devoted toward student opportunities to read and write. Instead of direct lessons on spelling skills, the incidental perspective promoted naturally learning through engagement in reading and writing (Heald-
Taylor, 1998; Templeton & Bear, 1992). Also known as the opportunistic approach, teachers provide spelling and vocabulary instruction only during a moment of need (Henderson, 1981). This approach includes teachers assisting students to improve spelling during the writing process, such as recognizing errors and applying learned spelling patterns to make corrections. Despite being promoted by some educators, multiple research studies contradicted the context-based spelling approach.

Comparative research on context-based spelling demonstrated that explicit spelling instruction led to greater orthographic growth than implicit methods (Fitzgerald, 1951; Horn, 1967). Furthermore, spelling development from incidental methods were mostly temporary (Henderson, 1981) as students utilized multiple strategies to decode a work in a specific situation, but did not retain a qualitative growth in word knowledge. This difficulty of learning spelling during the course of writing can be connected to limitations on processing memory.

Similar to working memory, the term “processing memory” as described by researchers, refers to the capacity of information a person can store in a moment when solving a complex mental task (Ericsson & Kintsch, 1995). When students are writing, they are juggling the process of creatively crafting a message by pairing their thoughts with appropriate vocabulary and sentence structure. As a student’s working memory is so heavily engaged, attention to spelling can be minimized, resulting in increased in spelling errors (Ransdell & Levy, 1996). Attempting to instruct students in spelling under such a complex context would be less beneficial and possibly a frustrating experience for the learner who is striving to juggle multiple concepts (Berninger et al., 1998). Furthermore, studies have shown that when students are under the pressure to provide accurate spelling, they are more inclined to avoid utilizing orthographically complex words in favor more simply spelled words, despite the added stylistic value of more
unique and descriptive vocabulary (Calkins, 1998; Graham, Morphy, Harris, & Chorzempa, 2008).

In contrast, multiple research studies have provided evidence of the benefit for using systematic spelling instruction (Fulk & Stormont-Spurgin, 1995; McNaughton, Hughes, & Clark, 1994; Wanzek, Vaughn, & Wexler, 2006). Systematic instruction refers to spelling instruction that includes immediate, corrective, explicit, and ample feedback to scaffold students to higher levels of understanding (Sayeski, 2011). The concept of immediate feedback was found in multiple studies to improve student spelling growth, when compared to corrective feedback provided at a later point in time. For example, it is preferable to guide a student toward spelling accuracy during the course of a lesson or following an error (written or oral), rather than presenting feedback at the conclusion of an activity or a later date. Delayed feedback includes the traditional paper grading approach in which teachers make corrections to student papers for classwork, homework, or assessments that are returned hours later or the next day (McGuffin, Martz, & Heron, 1997; Wanzek et al., 2006). Another element of systematic instruction is the clear and direct scaffolded support that can be achieved through multiple methods, such as small group instruction (Fulk, 1996; Wanzek et al., 2006) or peer tutoring (Telecsan, Slaton, & Stephens, 1999). The peer tutoring approach demonstrates that students simply partnering with peers and utilizing corrective feedback materials can provide the repetitive and differentiated support for students to improve spelling (Telecsan, Slaton, & Stephens, 1999). Generally, in order for students to achieve success, spelling practice cannot be assigned as homework activities and/or independent work, because corrective feedback is lacking with such formats. The ideal instructional approach begins with clear and direct teacher instruction and modeling of spelling features, followed by guided practice with the spelling words, and finally reinforced through
frequent work with ample corrective feedback (Fulk & Stormont-Spurgin, 1995; McNaughton et al., 1994; Wanzek et al., 2006).

**Commercial spelling programs.** Even though much research presented the benefits of developmentally organized programs and the need for differentiation, commercially published spelling programs continue to hold a major role in classrooms across the United States (Wallace, 2006). Commercial spelling programs, as described by Heald-Taylor (1998), provide word lists for studying and learning on a weekly basis and are paired to a grade level for classwide spelling instruction.

Attempts by commercially-based programs to have weekly lists at the advanced and remedial levels have not provided adequate differentiation, due to the limited options possible with scripted directions (Henderson, 1990; Wilde, 1990). True differentiation practices to meet a potentially wide-range of grade level needs are not evident in commercial programs (Schlagal, 2001). Commercial spelling programs lacking true differentiation include Open Court, Houghton-Mifflin, and Harcourt (Fresch, 2003; Pearson & Stahl, 2002). These commercially based programs are essentially only slightly more student-centered that the basal spelling programs of the previous century. Regarding usage, implementing a study of 42 teachers in Grades 2-5, researcher Johnston (2001) found that 93 percent utilized a commercial spelling program to determine the weekly spelling lists and associated activities. Such widespread usage suggests spelling instruction nationally has yet to move strongly in the direction of developmental literacy research.

**Proofreading for spelling instruction.** Spelling instruction was also approached by educators through the methods of proofreading. Proofreading refers to students using their own written products as an activity for spelling self-correction. This approach follows the incidental
or opportunistic method to spelling instruction in which teachers guide students to learn words they are applying in their authentic texts in contrast to a predetermined list of words.

Even though proofreading is a useful skill for writers, studies were not supportive of this approach to learn spelling due to multiple challenges it presents for gaining orthographic knowledge. First of all, proofreading as a general task is difficult for students, because proofreading errors requires a particularly high attention to detail beyond spelling knowledge (Henderson, 1981; Schlagal, 2002). Secondly, students innately struggle to recognize errors in their own writing in comparison to novel texts (Horn, 1969). Thirdly, proofreading warrants dedicated instruction on a consistent basis in order to show improvement (Hildreth, 1955), which creates an obstacle beyond just spelling improvement. For instance, a teacher could devote daily instructional time to sentence correction, editing sentences with spelling, grammar, and punctuation errors. Although purposeful, sentence correction adds another lesson to the comprehensive literacy structure beyond independent writing and word study introduction.

Considering the complexity of proofreading and the limited results, spelling instruction is more appropriate with planned lessons, rather than a subset of goals addressed through proofreading.

**Content vocabulary spelling lists.** Another more recent spelling instructional approach focuses on lists of vocabulary words based on content curriculum (Schlagal, 2002). Instead of separating spelling instruction from other content studies, lists for study and practice are integrated into science, social studies, and/or mathematics. Through this approach, a unifying curriculum topic is the theme of each list, which is taught accompanying a unit of instruction. For example, a teacher could distribute a 25-word list of space vocabulary during a three-week solar system unit studying the sun, moon, and planets. Proponents raise the argument that word lists with a curriculum focus provides a meaningful connection between words that supports
spelling growth (Johnston, 2001). Even though morphological knowledge can enhance understanding, research studies do not provide support for vocabulary lists to improve spelling (Schlagal, 2002), due to the specific challenges that curriculum-based lists provide.

In order for students to compare and contrast words, it is important for them to be familiar and comprehend the meaning of the words (Henderson, 1990; Schlagal & Schlagal, 1992; Templeton, 1991), which is in direct contrast to the goal of learning new vocabulary words. For example, if students were studying new concepts during a science unit on electricity, an accompanying vocabulary list would be filled with multiple unfamiliar words (e.g. *electromagnet, proton, conductor*). A lack of electricity background knowledge could hinder many students’ abilities to utilize meaning cues for spelling. Furthermore, as previous research demonstrated the value of developing word lists based on similar orthographic concepts (Ganske, 2013; Invernizzi et al., 2003), vocabulary lists ignore that approach completely by presenting curriculum words with assorted spelling patterns and varied word length (Schlagal, 2002).

**History of Word Study Instruction**

The word study methodology was developed over a long history of research in language development and literacy instruction (Schlagal, 2002; Templeton & Morris, 1999). Word study approaches instruction on phonics, spelling patterns, and vocabulary through a differentiated and developmental approach that seeks to meet students at their instructional spelling levels and monitor progress through a range of assessments. Through collective research and classroom practice dating back to the late 1980s, word study has progressed to the program utilized today (Schlagal, 2002; Templeton & Morris, 1999).

**Pattern and rule-based spelling instruction.** Spelling instruction in the United States originated using word lists for memorization (Sayeski, 2011). This simplistic approach was
developed based on the view that the English language was such a blend of different origin languages that a consistent structure was nonexistent, which made systematic study illogical (Schlagal, 2007). In the 1960s, researchers began to identify the value of teaching rules and patterns that students could apply to spell a broad range of words, compared to just memorized lists. In a meta-analysis of spelling research (Wanzek et al., 2006), rule-based spelling interventions had the strongest impact on student spelling growth compared to traditional word list instruction when evaluating the effect sizes of the studies. As suggested by Sayeski (2011), pattern and rule-based curriculums enable teachers to plan out instruction in a sequential order of spelling skills that matches student development, rather than assorted word lists that can vary in difficulty week to week. Even when traditional word lists are determined by content subjects (e.g. electricity, economics, geometry), number of syllables, or word length, the lists are not necessarily progressing by level of difficulty.

Word study in contrast identifies common phonemes within words, which refer to the smallest units of sound that represent meaning. Phonemes in word study are organized by their level of challenge, scaffolding students to higher and higher levels of understanding. For example, students may begin with the most common long vowel patterns featuring the silent “e” marker (e.g. cape, pipe, hope) and later practice with less common vowel patterns (e.g. toy, cow, snow) as they become more advanced. The influence of research into pattern and rule-based instruction is evident in the design and usage of developmental word study programs in American classrooms. Programs such as Words Their Way (Bear et al., 2011) and Word Journeys (Ganske, 2013) were products of this new instructional focus.

Morpheme and meaning-based spelling instruction. As students master common spelling patterns and transition to higher levels of spelling, they move beyond phonemes to
identify morphemes within words. Morphemes refer to the smallest units of meaning within words, which include roots, bases, prefixes, and suffixes. Instruction at the more advanced spelling levels concentrate on learning new morphemes and understanding the contexts of their application (Sayeski, 2011). This shift toward comprehending morphemes and their generalization across words enables more accurate spelling with broader application in comparison to memorization tasks. This approach is evident in multiple spelling programs:

- **Spelling Through Morphographs** (Dixon & Engelmann, 2007) – An introduction to morphemes and their usage, which paired with teacher instructional lessons and independent student practice.

- **Word Journeys** (Ganske, 2013) – A comprehensive program with a focus on morphemes at the highest two stages, which includes multiple syllable words (Syllable Juncture stage) and word origins for vocabulary expansion (Derivational Constancies stage).

- **Words Their Way** (Bear et al., 2011) – The upper level stages address commonly applied morphemes (Syllables and Affixes stage) and word definitions (Derivational Relations stage).

**Instructional levels for spelling.** Word study instruction is built upon the concept of developmentally appropriate spelling content for teaching and learning. This approach continued along the trends of developmental approaches for reading instruction in terms of guided reading groups and leveled texts (Fountas & Pinnell, 1996; Pressley, 1998). Rather than the same words for students across a grade level or classroom, assessment determines the spelling level for each student and matches curriculum accordingly. Just as students within a reading group would have similar reading levels and instructional needs (Fountas & Pinnell, 1996; Pressley, 1998), a word
study group would include word lists for students with common prior word knowledge and spelling needs. Teaching at the instructional level is incredibly important for an effective word study program, because students demonstrate more spelling growth when working with words at their instructional level compared to entire lists of above-level or frustration level words (Morris et al., 1995).

The concept of the instructional level in word study refers to the words that students “use but confuse” in writing (Bear et al., 2011; Invernizzi, Abouzeid, & Gill, 1994), which describes how students apply a spelling concept, but do it inaccurately. As outlined by multiple researchers (Hillerich, 1982; Morris, 2014; Morris, Nelson, & Perney, 1986), the application of spelling concepts in context demonstrates different levels of understanding. The performance criteria for spelling place students in the following categories:

- Independent level: 90 – 100%
- Instructional level: 50 – 89%
- Frustration level: Below 40%

Students performing at the independent level would have a high-rate of accuracy on weekly word lists, prior to study or practice. In contrast, at the frustration level, students would remain inaccurate spelling new concepts, despite weekly instruction. Finally, a student spelling at a specific instructional level may over apply a spelling rule, or inconsistently apply a feature in a specific context. For example, as a student learns the silent “e” feature, he or she could over apply to other long vowel sounds, such as spelling the word “team” as “teme” in writing. This shows the student using but confusing the silent “e” feature, which is in contrast to a level of mastery (consistently spelling a feature correctly) or frustration (a feature is absent from spelling).
The approach to teaching word study at a student’s instructional level includes using lists of words that balance the new with the known. Rather than introducing a full list of words with a new spelling feature for memorization, a list of words includes previously studied concepts, which students compare and contrast with new features (Bear et al., 2011; Ganske, 2013). Rather than solely focusing on new features, students are able to analyze how a feature connects within a broader range of skills, enabling a deeper level of understanding and increased generalization in writing. For example, a 25-word sort introducing the long “i” sound with the –igh feature (e.g. fight, high, night), would incorporate possibly nine words with that feature, while also including examples of the long “i” sound using –y (e.g. why, cry, fly), silent “e” markers (e.g. fine, white, time), and the short /i/i/ sound (e.g. pit, big, tip).

The word study spelling approach addresses a student’s instructional level by incorporating categories of words that meet multiple needs: (a) repeating previously mastered material; (b) reviewing recently introduced material; (c) introducing new material. Illustrating through the previous example, the short /i/i/ vowel sounds were previously mastered, long “i” with the silent “e” and –y features were recently introduced, and the long “i” using –igh was the feature introduced. Within the same word study sort, scaffolded support is provided to guide students to high levels of understanding with the assistance of the expert, which in many cases is the classroom teacher. Although students’ needs are unique, the carefully selected words within a single word study sort address the complexity of spelling development. As word study gained in popularity and programs such as Words Their Way (Invernizzi et al., 2000) and Word Journeys (Ganske, 2000) were increasingly used in classrooms nationwide, additional materials were published with more detailed word study sorts to match with the specific needs of students.
Some popular word sort lists included the following:

- **Words Their Way** sort books
  
  - *Words Their Way: Word Sorts for Letter Name-Alphabetic Spellers* (Johnston, 2014) – single-syllable words comparing basic consonants and short vowel sounds, including word families with onsets and rimes.
  
  
  
  - *Words Their Way: Word Sorts for Derivational Relations Spellers* (Johnston, Bear, & Invernizzi, 2006) – multiple-syllable words concentrating on morphemes such as roots, bases, prefixes and suffixes.

- **Word Journeys** sort books
  
  
  - *Mindful of Words: Spelling and Vocabulary Explorations 4-8* (Ganske, 2008) – multiple syllable spelling and vocabulary study, concentrating on morpheme units and syllable combinations.

**Assessment for word study.** Reaching a classroom of students at their instructional levels is not a simple task, because a teacher must identify the specific spelling needs of each
student. Although for most age-based classrooms (e.g. third grade), students will spell at a common level of word knowledge (e.g. comparing long vowel sounds for single-syllable words), some children will also fall below or above that grade level expectation (Templeton & Morris, 1999). As word study instruction was developed, forms of diagnostic assessments were created to assist teachers in finding the spelling needs of their students. Word study assessments include grade level lists of approximately 20 words (Schlagal, 1982), multi-grade inventories with 15-26 words (Invernizzi, Templeton, & Johnston, 2000), and developmental spelling assessments with 25 words focused on a specific stage (Ganske, 2000). Although similar in purpose, these word study assessments have different advantages and are applicable based on the needs of the teacher. If seeking a quick diagnostic with wider applicability, grade or multi-grade assessments are preferable. Stage specific assessments require more selective teacher application, but yield more detailed data for instructional analysis.

Assessment is critical for teachers to determine where a student falls along the developmental spelling continuum. Teachers want children to be challenged beyond their independent level, yet not at a level of frustration. Over the course of a week of instruction, the goal is for a student practicing with a word study list to move beyond the instructional level of understanding (50% – 89% accuracy) to an independent level of spelling knowledge (over 90% accuracy). Improved performance is achieved through the weekly routine of teacher explicit instruction, scaffolded practice, repeated independent work, and final application on a summative assessment. A critical detail in this progression is assuring that students are at the instructional level to begin the week (pretest score), regardless of their eventual performance at the end of the week (post-test score). This distinction is important because even frustration level spellers can appear to achieve appropriately at the end of the week (90% accuracy or higher) due to sheer
repeated effort and practice (Templeton & Morris, 1999). Such a situation describes the category of students who comprehend few of their words at the beginning of the instructional week, but apply considerable time and effort to memorize all of the words on their list by week end. A surface-level understanding can result in a high score on a traditional oral dictated spelling test, but lacks worthwhile generalization to other words, different contexts, or application when writing (Templeton & Morris, 1999).

Long-term understanding cannot be achieved by frustration level spellers, because their growth is dependent upon memorized knowledge that can be forgotten over time. Students’ progression from instructional to independent performance on weekly assessments can demonstrate a deeper-level of understanding with long-lasting application. The preferred progression describes students who begin the week able to spell 50% or more of the words, who work toward spelling 90% or more by week’s end (Templeton & Morris, 1999).

Word study teachers and researchers identified the need for a more comprehensive evaluation of student progress in spelling beyond the weekly spelling test. Although formative data could be collected from weekly spelling tests, teachers remained unaware of student transfer of their new knowledge to writing and maintenance of learned concepts over time. Recommended assessment methods to address this need include:

- **Words Their Way: Qualitative Spelling Checklist** (Invernizzi et al., 2000) – a checklist for evaluation of uncorrected authentic student.

- **Cumulative skill review tests** (Morris et al., 1995) – approximately every six weeks a cumulative review of previously learned features combined into a single spelling test, repeating previous words and words matching previous patterns.
• Student writing analysis (Templeton & Morris, 1999) – general formative analysis of student writing for application of learned spelling concepts.

**Teachers’ experiences implementing word study.** At the time of this literature review, a breadth of research did not exist regarding teachers’ experiences implementing word study, but a few studies investigated associated aspects to this issue. Following a study of small-group word study instruction with kindergarten, first, and second grade students, researchers Williams, Phillips-Birdsong, Hufnagel, Hungler, and Lundstrom (2009) developed a list of recommendations to improve word study implementation. In summary, the list of recommendations included:

- Use multiple assessment tools
- Set aside time to prepare word study lessons
- Teach word knowledge, rather than words on a list
- Teach application of word study in reading and writing
- Integrate classroom word walls
- Provide students with time to practice word work
- Support word study with authentic reading and writing

Research was also conducted by Bloodgood and Pacifici (2004) regarding how a sample of intermediate grade teachers viewed and practiced word study instruction. In the positive sense, teachers recognized the value of word study to meet diverse student instructional needs through differentiation. Also, teachers were aware of the benefits of word study for phonics, reading, writing, and vocabulary development. In terms of concerns, the overarching challenge for teachers was to manage instructional time constraints in both lesson preparation and fitting into the instructional day. Other concerns included professional limitations in terms of
knowledge and experience, as well as management of numerous word study materials. Finally, teachers were also aware of the potential challenge of parental support of unfamiliar word study instruction, because it differed from the traditional memorized-spelling approach that most parents experienced.

**Theories of Language Development**

Language theorists such as Lev Vygotsky, Noam Chomsky, and Jean Piaget revealed the developmental stages of human learning. Building upon child development research, education theorists including Kathy Ganske, Donald Bear, and Shane Templeton created the word study instructional program to address the stages of orthographic development.

**Lev Vygotsky’s zone of proximal development.** A famous theorist studying developmental psychology, Lev Vygotsky, proposed the concept of the zone of proximal development (ZPD), suggesting that people learn through supportive instruction from a more advanced person in an area for growth (Vygotsky, 1962; 1978; 1980). Vygotsky’s theory is highly relevant in education research, because teachers direct their efforts toward the ZPD, also commonly referred to as the instructional level. In word study instruction, the ZPD concerns the literacy level of students, which incorporates, but is not limited to background knowledge in phonological awareness, alphabet knowledge, letter sounds, and vocabulary (Bear & Templeton, 1998). The differentiation approach to word study, through diagnostic assessment and targeted instruction, addresses how the ZPD varies for different students within a single classroom.

**Noam Chomsky’s theory of universal grammar.** In the history of psychology and linguistics, Noam Chomsky is perhaps the most influential theorists with over 100 publications and countless research citations worldwide (Barsky, 1998). Chomsky’s theory of universal grammar (UG) was one of his most groundbreaking ideas, proposing that humans have an innate,
biological understanding of grammar, which facilitates language development (Chomsky, 1972; 1995). His approach to language acquisition brought a scholarly emphasis on studying how children learn and the developmental language process. Regarding spelling, the UG theory goes against historical spelling instruction that centered on the memorization of weekly word lists and the study of dictionary definitions (Schlagal, 2002). In contrast, word study is an active exploration of words through comparing and contrasting word patterns that builds upon the innate human understanding of language.

Jean Piaget’s stages of infant development. Primarily known for his studies of children, Jean Piaget was the first psychologist to conduct a statistical research study of cognitive development (Piaget, 1936). His observational studies of young children, complemented with simple mental tasks, revealed the stages of child cognitive development. The stages he identified (e.g. concrete operational stage) described qualitative changes in infant understanding as children mature and explore the world (Piaget, 1952). His work outlined general windows of development, but also recognized that the pace of development can vary based on the child. Furthermore, his research importantly stated that child development is an ongoing process of growth with a specific order of stages (Piaget, 1957). Word study follows Piaget’s stage-based development theory, by describing spelling growth of students in a series of progressing stages from simple letter-sound knowledge to complex multiple-syllable words (Bear, Invernizzi, Templeton, & Johnston, 2011; Bear & Templeton, 1998; Ganske, 2013).

Theories of Word Study

As education practices shifted toward constructivism and individual literacy development, the word study program was developed to address differentiated spelling instruction. The word study approach outlined a stage-based map of spelling growth and
presented instructional methods to meet student needs. The leading methods for word study include *Word Journeys* (Ganske, 2000, 2013) and *Words Their Way* (Bear et al., 2011; Invernizzi et al., 2000), which align with the theory of spelling development presented by Donald Bear and Shane Templeton (1998).

**Theory of spelling development.** Outlined by Donald Bear and Shane Templeton (1998), the theory of spelling development described the overall nature of the spelling process as well as how students comprehend spelling over a developmental continuum. Building upon prior studies (Henderson, 1990), the researchers proposed that spelling knowledge incorporates three interconnected layers:

- **Alphabetic** – matching letters to sounds and basic alphabet knowledge
- **Pattern** – grouping of letters into syllables, while exploring vowels and silent letters
- **Meaning** – a vocabulary focus by recognizing consistent meaning units within words

**Stage theory versus overlapping waves theory.** Over the period of development for of the word study program, two similar, but conflicting theories were prevalent in the research field regarding the process of acquiring word knowledge, the stage theory and the overlapping waves theory. During the 1980s and 1990s, the stage theory became widely recognized in education studies (Ehri, 2000; Gentry, 1992; Henderson, 1981), which suggested that children move sequentially through stages of spelling. The stage theory proposed that stages were a ladder of skills to be learned in a specific order as previously acquired word study knowledge (sound, pattern, and meaning) opened children to learn more advanced skills. In contrast, the overlapping waves theory gained prominence in 2000s, which considered student knowledge of spelling to be more flexible and inconsistent, recognizing the uniqueness of students thinking based on the situation (Kwong & Varnhagen, 2005). Although students do follow a
developmental continuum of spelling knowledge, learned skills are not always applied for new words and students can vary their approach based on the context (Varnhagen, McCallum, & Burstow, 1997). Simply stated, students cross between more or less advanced strategies when spelling, which overlap between stages of development, but remain within a general range of ability on the spelling continuum (Varnhagen et al., 1997).

**The Words Their Way program.** The *Words Their Way* program for word study has been in publication since 2000, and continues to be in circulation through a fifth edition (Bear et al., 2011). *Words Their Way* has been supported in multiple research reviews for its effectiveness teaching spelling instruction (Jeffes, 2014; Gehsmann, & Templeton, 2011; Meseck, 2009). Furthermore, *Words Their Way* has demonstrated broad applicability with this usage with students in preschool (Cabell, Justice, Zucker, & McGinty, 2009; Maslanka & Joseph, 2002), elementary school (Barone & Xu, 2008; McLaughlin, 2009), and secondary grades (Harris, 2007; Nagy, Berninger, & Abbott, 2006).

The program presents a spelling approach that includes the sorting of letters and words to draw conclusions about similar meanings. *Words Their Way* program built upon the word sorting techniques invented by Henderson (1981), enabling students to make comparative connections between words that increase knowledge of language across the alphabetic, pattern, and meaning layers. The word sorting process not only serves to increase orthographic knowledge, but also builds interest and excitement about spelling (Zutell & Compton, 1993). Furthermore, the spelling knowledge students acquire has broader application, shown to increase reading achievement (Henderson, 1981) and writing skills (Zutell & Compton, 1993).
The students work with lists based on their stage of development, leading students to a stronger understanding of orthography. Under the *Words Their Way* structure, students progress through four broad stages of spelling:

- **Emergent (0 – 5 years)** – prephonetic stage; prior to formal reading skills; lacking conventional matching of sounds to letters (concept of word), directionality (left-to-right reading), and phonological awareness.

- **Letter Name (5 – 8 years)** – phonetic stage; basic alphabet knowledge present (letters and sounds); working with consonants, blends, and digraphs with short vowels; word families major focus of instruction combining onsets and rimes (e.g. \( b + at = bat \)).

- **Within Word Pattern (7 – 10 years)** – transitional reading abilities with strong foundation of sight words; instruction on spelling single syllable long vowel patterns and homophones.

- **Syllables and Affixes (9 – 14 years)** – fluent reading with expression; instruction on spelling of multiple-syllable words with affixes and plurals; begin study spelling-meaning connection.

- **Derivational Relations (15 years – adulthood)** – advanced reading with focus on study skills; instructional goal expand wide vocabulary; study word derivations, including Greek and Latin roots.

According to Bear, Invernizzi, Templeton, and Johnston (2011), despite the differences of skills for students in different stages, all of word study is focusing on “reveal consistencies within the written language system” (Bear et al., 2011, p. 5). *Words Their Way* seeks to expand students’ general understanding of language to compare, contrast, and analyze words, while also learning specific knowledge of words through weekly targeted instruction.
The Word Journeys program. Kathy Ganske designed the first edition of developmental spelling program Word Journeys in 2000, presenting an alternative program to Words Their Way, while also containing many similarities. Word Journeys has been in wide circulation in American schools over the last decade and recommended by researchers (Bloodgood & Pacifici, 2004; Jeffes, 2014; Massengill, 2006), particularly due to its detailed assessment materials to diagnose student needs. In 2013, Ganske published a second edition of the text, including updates in research, teacher materials, and activities, as well as expanding resources for preliterate students and English language learners.

Ganske’s program highlights the effectiveness of basic spelling inventories used in other programs (Perfetti, 1992; Templeton & Bear, 1992) to be the key to starting an effective word study program. Furthermore, Ganske presents the Developmental Spelling Assessment (DSA; Ganske, 1999) as a clear indicator of a student’s spelling level. The Word Journeys program lends from the Vygotsky’s (1978) concept of the zone of proximal development as the starting point for each student as the student begins the daily word study activities. This refers to what the student already knows and the potential for expanding knowledge through support of a teacher. Students build connections across the entire word study spectrum as they learn sounds, patterns, and meaning connections.

The Ganske word study program specifically assesses student word knowledge and provides appropriate word lists for students to build knowledge through scaffolded teacher support. The five stages outlined by Ganske (2000, 2013) mostly parallel the Words Their Way program in terms of identified skills, but with slight variance in stage names:

- Emergent (Grades PreK–K) – learning letters stand for speech (alphabetic principle) and concept of word through repeating rhymes, songs, and manipulating phonemes.
• Letter Name (Grades K–3) – basic alphabet knowledge, word families, and short vowels, reading short repeated text to build sight words.

• Within Word Pattern (Grades 2–4) – beginning reading abilities with good sight word vocabularies, building fluency, and spelling with patterns exploring long vowels.

• Syllable Juncture (intermediate Grades 3–5) – fluent reading and spelling of multiple-syllable words concentrating on syllable patterns, boundaries and their combinations.

• Derivational Constancy (Grades 4 – adulthood) – advanced reading with focus on vocabulary derivations and the spelling-meaning connection.

The major advantage of the Word Journeys program is its effective materials for assessing word knowledge. The program provides multiple teacher-friendly and effective resources to get a broad overview of class needs as well as detailed information about each student’s word knowledge.

**Word study instruction.** Although word study instruction can be interpreted uniquely based on the preferences of the teacher, the predominant method is outlined in the resources *Word Journeys* (Ganske, 2013) and *Words Their Way* (Bear et al., 2011). These two resources have differences, but the essential components are the same or similar. The following list outlines the main components of word study:

- Includes phonic-word knowledge, spelling, and vocabulary

- Explores relationships between sound, pattern, and meaning in words

- Uses an active and hands-on approach through comparing and contrasting features by sorting words into groups

- Diagnostic assessment and grouping enables differentiated instruction for a classroom of students
• Builds upon what students already know at their instructional levels
• Curriculum is developmental with a sequential order of word knowledge
• Skills transfer to students reading, spelling, and writing practices
• Applicable for students in Kindergarten through eighth grade

Although variations can occur, true word study practice needs these essential characteristics to be implemented with legitimacy. In addition, word study is not taught separately, but rather should be part of a balanced literacy framework with authentic reading and writing instruction (Bear & Templeton, 1998).

**Word Study Related Literature**

In the field of research related to word study instruction, multiple themes emerge that define the needs of students and the experience of teachers. In regard to meeting student needs, word study presents explicit spelling instruction, methods to expand vocabulary, and the transition of spelling skills to writing. For teachers implementing word study, their experience includes utilizing qualitative diagnostic assessment, planning differentiated spelling lessons, and participating in literacy instruction professional development. These themes are explored in the following review of related word study literature.

**Expanding vocabulary knowledge.** Word study instruction also encompasses word meaning knowledge (Ganske, 2013). A balanced writing workshop scaffolds children to apply their spelling knowledge to write purposeful stories (Calkins, 1998). Beck, McKeown, and Kucan (2013) recommend a targeted vocabulary program, which builds enthusiasm and motivates students to search and apply new words. The authors describe language as a sea of words with three tiers:

• Tier 1 – commonplace words
• Tier 2 – less common words, but applicable and ideal for instruction
• Tier 3 – advanced and specialized words

Word study also promotes cross-curriculum vocabulary instruction. It encourages students to connect their knowledge across spelling, reading, and writing to decode and understand new words (Critten, Pine, & Messer, 2013). Children internalize the features they sort to make connections between roots, bases, and derivations of words (Ganske, 2013). Word study concepts can be applied outside language arts in science, mathematics, and social studies at the elementary level (Beck, McKeown, & Kucan, 2013).

**Applying spelling strategies during writing.** Spelling accuracy during the act of writing is a key component of successful word study instruction, because it requires the understanding of learned spelling features for application. Furthermore, authentic writing is the overall purpose of learning to spell, rather than success on a weekly spelling test. Basic grammar instruction has been a traditional component of writing for decades (Calkins, 1998); yet formal grammar lessons show little evidence of improving student writing (Andrews et al., 2006). Teachers have more recently been moving in the direction of integration to enhance instruction across subject areas, particularly focusing on connecting research across spelling, reading, and writing (Moore, Moore, Cunningham, & Cunningham, 1994).

Guided writing methods have been explored in the past decade with differentiation approaches similar to guided reading. In guided writing, the teacher works with small groups of students with similar writing needs for focused writing strategy instruction (Gibson, 2008). Including components of revision and editing, guided writing has been shown to improve accurate student text production through self-monitoring and writing strategy usage (Gibson, 2008). Furthermore, weekly spelling meetings as outlined by Wright (2000) were researched as
another avenue for small group differentiated instruction. This procedure functions by meeting with students on a weekly basis for inquiry-based spelling instruction in which students record words that are challenging, confusing, or simply unknown to them for analytical discussion. Weekly spelling meetings connected directly with reading engagement and written composition, because it was not only motivational, but also demonstrated significant student growth in spelling (Wright, 2000).

**Qualitative diagnostic assessment.** In regard to student spelling knowledge, qualitative diagnostic assessment is critical for word study instruction (Ganske, 2013; Schlagal, 2002). Assessment drives instruction, because it allows teachers to plan lesson to meet the needs of students at different levels. Although traditional spelling assessment is associated with word lists that students memorized for weekly dictated tests, multiple assessments have been developed in the past 15 years to screen students to evaluate overall student spelling knowledge (Ganske, 2013; Invernizzi, Swank, Juel & Meier, 2003; Masterson & Apel, 2010).

The Phonological Awareness Literacy Screening (PALS) (Invernizzi et al., 2003) is an assessment of alphabet and letter-sound knowledge used to assess students to identify areas of weakness in phonological awareness. The PALS recognizes that students arrive in the classroom with unique background knowledge and different literacy levels. Similarly, the Spelling Sensitivity Score (SSS) developed by Masterson and Apel (2010) is effective in detecting developmental growth in spelling over time. In addition, qualitative assessments are incorporated into the *Words Their Way* and *Word Journeys* programs. The Developmental Spelling Assessment (DSA; Ganske, 2013) and the Primary Spelling Inventory (Bear et al., 2011) are prerequisites for teachers to have the necessary data to establish word study groups and begin differentiated instruction.
Word study diagnostic data is an important element of overall language arts instruction, considering connections have been determined between spelling skills and overall literacy abilities (Invernizzi & Hayes, 2004). For example, a correlation was found between weak morphological awareness and poor reading and spelling performance (Apel & Lawrence, 2011). Prior vocabulary knowledge and language input from home can vary greatly between young students and elementary classrooms generally have wide a range of spelling levels (Henderson, 1990; Schlagal, 1982). Furthermore, morphological spelling concepts have varying levels of difficulty and require varied teaching approaches (Bourassa, Beaulieu, & MacGregor, 2011). For instructional planning purposes, teachers must understand the needs of their students and be well-versed in the stages of word study development. At the most basic level, children learn language through continuous meaningful input over time (Krashen, 1989), which requires teachers to align the word study curriculum and plan word study lessons students can understand at their instructional levels.

**Literacy instruction professional development.** The implementation of almost any instructional objective with fidelity requires professional development for teachers. Professional development provides the background knowledge, resources, training experience, and support teachers need for implementation (Ganser, 2000). In terms of reading professional development, teachers with adequate literacy content knowledge can provide purposeful and effective reading instruction (Piasta, Connor, Fishman, & Morrison, 2009). Furthermore, teachers with background knowledge of student spelling development and invented spelling patterns can design quality word study instruction (Bear & Templeton, 1998).

Although just because professional development is held and attended, does not mean it will make an instructional impact. For example, as part of a study analyzing literacy
professional development, a sample of second grade teachers participated in a university training for reading instruction (Anderson & Standerford, 2012). Despite the teachers witnessing student growth, they did not have transformational change in their literacy philosophies. A disconnect has also been found on a national scale, considering that despite an awareness of ineffectiveness, a majority of elementary teachers continue to use traditional spelling routines in their classrooms (Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014). Professional development can be purposeful for teachers, but requires reflective practices for successful integration into the classroom (Brownell et al., 2013).

**Differentiated instruction to meet student needs.** An essential defining component of word study that separates it from traditional word list spelling programs is differentiated instruction (Bear & Templeton, 1998; Schlagal, 2002). The word study structure is designed to teach groups of homogenously skilled students with a range of instructional levels. The *Words Their Way* (Bear et al., 2011) program outlines a method of word study instruction for children from emergent spellers to advanced vocabulary instruction. The *Word Journeys* (Ganske, 2013) program has a similar grouped approach to *Words Their Way*, except it also includes detailed diagnostic assessments to plan specialized grouped instruction. In general, modern spelling programs are shifting toward multiple student-centered spelling concepts taught concurrently (Anderson & Standerford, 2012).

The word study approach to differentiate spelling instruction was based on multiple research studies that revealed the specific spelling knowledge of students and the need for explicit teaching. Explicit, meaning-based, word knowledge instruction has been shown to be more beneficial than memorization (Cordewener, Bosman, & Verhoeven, 2015; Hilte & Reitsma, 2011). Instruction should concentrate on specific deficiencies in students and group
students with similar needs (Kelman & Apel, 2004). Differentiation that provides specialized teacher small group support can be highly influential, such as the invented spelling instructional approach.

The invented spelling approach involves working with students during writing situations to make corrections to invented spelling mistakes that reveal their growing orthographic knowledge of letters, sounds, and words (Ouellette & Sénéchal, 2008). Invented spelling instruction concentrates on the zone of proximal development (Vygotsky, 1962; 1978; 1980), as the teacher only corrects and instructs words that are within the instructional level of the students. In a study working with over 40 kindergarteners, invented spelling instruction was found to lead to more significant spelling growth and learning-to-read skills compared to phonological awareness activities (Ouellette, Sénéchal, & Haley, 2013). Using the invented spelling approach, improved student growth was found for not only in the short-term for kindergartners, but also in the long-term for these students progressing into higher grades (Ouellette, Sénéchal, & Haley, 2013).

**Students with learning disabilities.** Regarding students with learning disabilities (LD) and/or specific language impairments (SLI), word study can provide appropriate instruction for students with special needs by incorporating appropriate accommodations (Sayeski, 2011). Furthermore, students with SLI do not need to be exempt from word study instruction or work toward lowered expectations for performance, but rather provided additional exposure to spelling concepts for retention (Cordewener, Bosman, & Verhoeven, 2012). According to Worthy and Invernizzi (1990), students who demonstrate significant difficulty with spelling activities are not learning on a different continuum, but instead progress along the same developmental course as
their peers, but at a slower rate of progress. Through differentiation and scaffolded support, word study can present benefits for all students.

Word study creates a framework that can meet the essential elements of spelling instruction as outlined by Wanzek, Vaughn, and Wexler (2006), who conducted a meta-analysis of research on spelling instruction for students with disabilities. The researchers four key elements include: (a) systematic study strategies; (b) immediate, corrective feedback following errors; (c) repeated practice with spelling concepts; and (d) the teaching of spelling patterns and/or morphology. Each present in the word study program, these elements consistently led to improvement in spelling outcomes for students with learning disabilities (LD). On a weekly basis, word study presents a framework for teachers to explicitly teach sorts based on sound, pattern, and meaning. Students learn word study concepts through repeated practice scaffolded appropriately by a teacher.

The process of spelling instruction for students with LD is in many ways similar to quality instruction for all students. In the recommendations described by Sayeski (2011), teachers should follow certain instructional steps: (a) appropriate assessment; (b) differentiated and explicit instruction; and (c) comparing and contrasting pattern instruction for generalization. This systematic instructional approach is effective for reaching all students, building student word knowledge, and promoting strategy use for students to be successful spelling in the context of writing. When comparing the recommendations of Sayeski (2011) with word study researchers regarding assessment, instruction, and purpose, the approaches are very similar to achieving student spelling success (Bear et al., 2011; Bear & Templeton, 1998; Ganske, 2013).

For students with LD the most critical component is determining the developmental level for instruction, followed by appropriate accommodations to meet specific student needs (Worthy
& Invernizzi, 1990). As recommended by Templeton and Morris (1999), instruction can be adapted in multiple ways: (a) reducing the number of words; (b) increasing the explicitness of instruction; (c) expanding amount of time for practice and review.

Curriculum standards for word study. As for any subject in the public school setting, instruction occurs within the broader context of the curriculum. The content teachers select does not occur within a vacuum, but rather is heavily influenced by national, state, and local curriculum standards. Standards describe the specific content expectations for students based on grade level, essentially guiding what educators must teach over the course of the year. Word study is influenced by the way standards either emphasize or deemphasize spelling and vocabulary.

In terms of consequential developments at the national level, the original institution of the No Child Left Behind (NCLB) legislation (NCLB, 2002) required states that receive federal funding to administer standardized tests yearly to all students. NCLB demanded adequate yearly progress for schools, while creating an inclusive environment that also assesses students with disabilities and English language learners. Although the objective of monitoring student growth is appropriate, NCLB limited the curriculum to certain evaluated subjects under specific testing formats. At the elementary level, language arts and mathematics assessments became the focus, which disregarded science and social studies teaching. In addition, multiple-choice tests were specifically emphasized compared to other assessment formats (e.g. projects, essays, short answer). For example, spelling is not incorporated into the tests, neither as a fill-in-the-blank format, nor spelling words in sentence context. Years later, a national movement toward the Common Core State Standards (2010) brought standards-based teaching once again into the public spotlight. Common Core presented a list of grade level standards for math and reading
that states could adopt to provide uniformity to curriculum expectations across the country.

Similar to NCLB, spelling was not an emphasized learning objective and remained untested by the yearly Common Core assessments (CCSS, 2010).

Along with seven other states, including Alaska, Indiana, Minnesota, Oklahoma, South Carolina, Texas, and Nebraska, the Commonwealth of Virginia chose not to implement Common Core, rather remaining committed to their original Virginia Standards of Learning curriculum (VDOE, 2010). Also known as the Virginia SOLs, the standards refers to spelling as “correct spelling for frequently used words” (VDOE, 2010, p. 21) and “correct spelling for frequently used sight words” (VDOE, 2010, p. 21). This vague reference does not outline the specific word knowledge and spelling abilities for students and connectedly does not assess these skills with standardized tests. Language arts tests evaluated basic reading comprehension through reading passages and responding to questions, but do not test spelling accuracy (VDOE, 2010).

As the Virginia SOLs have limited acknowledgement for spelling, the local school system for this study, Northern Virginia Public Schools, developed standards to fill this void. Referring to the NVPS curriculum framework, spelling is evaluated by two local standards that require students to use sound, pattern, and meaning units to spell words in written work and in isolation (NVPS, 2014). Since 2005, the official spelling program of NVPS has been the word study approach, based on the Words Their Way (Bear et al., 2011) and Word Journeys (Ganske, 2000) programs. The programs complemented each other in terms of assessment and instruction, as Word Journeys assessments were used to diagnose the needs of students, while the Words Their Way sorts were utilized for weekly lessons and student practice.

Although not monitored with standardized assessments, word study was reinforced by NVPS through materials and professional development. Initially beginning in the mid-2000s
with the Grades K-2, the county provided training workshops for teachers and ongoing support from literacy facilitators (Mihalik, 2010). The program then expanded to Grades 3-5 in 2010 providing a consistency to spelling across grade levels (Mihalik, 2010). In the current NVPS model, students practice word study in the primary grades concentrating on phonological awareness and word patterns, progressing to vocabulary-based word study in the upper-elementary grades.

**Summary**

Chapter two reviewed the research associated with this study, including historical information regarding spelling, word study, and language development. Over the past century, spelling instruction has progressed considerably in response to literacy research and education trends. Ever-present in American classrooms, spelling began in more scripted formats with basal programs (Schlagal, 2002) and memory-based word lists (Hanna, Hodges, & Hanna, 1971). Over time, these drill based formats became more student focused by incorporating grade-level appropriate approaches recognizing the differences in abilities based on age (Henderson, Estes, & Stonecash, 1972; Nelson, 1989). Classroom wide programs eventually became more specialized, identifying the differences in children and providing multiple words lists for different word knowledge levels (Henderson, 1990; Morris, 1999). Advancements in spelling established the foundation for the development of the word study program and its adoption by many classrooms.

Although other spelling approaches were tested over the twentieth century such as commercial programs (Heald-Taylor, 1998), proofreading (Horn, 1969), and content vocabulary lists (Schlagal, 2002), word study emerged as one of the most research-supported and widely used methods nationwide (Bear et al., 2011; Ganske, 2013). Word study enabled teachers to
have an efficient spelling and vocabulary program to meet multiple instructional levels. The word study program integrated phoneme (Wanzek et al., 2006) and morpheme instruction to guide students toward deeper understanding. Furthermore, word study provided methods for diagnostic, formative, and summative assessments to allow teachers to correctly align curriculum and guide students to higher levels of understanding (Invernizzi, Templeton, & Johnston, 2000; Schlagal, 1989). Word study set itself apart from spelling by following the approaches of guided reading (Fountas & Pinnell, 1996), by teaching students at their instructional level (Bear et al., 2011).

Evident from this review of spelling literature, differentiated and developmental methods of word study instruction are valuable tools in elementary classrooms such as the *Word Journeys* (Ganske, 2013) and *Words Their Way* (Bear et al., 2011) programs. These methods incorporate qualitative diagnostic assessment (Invernizzi et al., 2003) and differentiated instruction (Anderson & Standerford, 2012) to meet student needs. They include vocabulary instruction (Beck et al., 2013), along with analysis of spelling patterns, and phonological knowledge.

Despite word study programs presenting research-based approaches that can address school literacy goals and meet unique student needs, a lack of research exists about teachers implementing word study. Teachers feel unprepared in their teacher training programs and professional development (Anderson & Standerford, 2012). Furthermore, teacher philosophies about spelling instruction are not matching their practices in the classroom (McNeill & Kirk, 2014), which is concerning when considering the needs of students. Cross-curriculum opportunities exist with word study (Critten et al., 2013), if teachers feel prepared to implement the program. Research needs to address the experience of teaching word study in authentic classrooms as part of a larger school curriculum to determine the roadblocks that exist with the
program, improve instructional practices, and further research-based methods in more classrooms nationwide. In chapter three, the method for conducting this study are outlined, describing specifically how data were collected and analyzed.
CHAPTER THREE: METHODS

Overview

As outlined in the research review, despite the numerous studies previously conducted, further research was necessary focusing on word study application. Studies have predominantly taken place quantitatively, evaluating student growth in spelling skills following spelling interventions (Cordewener et al., 2015; Mullock, 2012; Ouellette et al., 2013; Schlagal, 2002). Regardless of the data demonstrating spelling growth using word study, unless teachers feel they can use the program effectively, word study will continue to be underutilized compared to traditional outdated methods (Covault, 2011; Fresch, 2003). In contrast, a qualitative study of teacher experience could provide perspective to why teachers feel unprepared for spelling instruction (Carreker, Joshi, & Boulware-Gooden, 2010) and address the lack of conclusive published data regarding word study effectiveness (U.S. Department of Education, What Works Clearinghouse, 2013). Chapter three will describe the methods of the study, explaining the overall research design, data collection methods, and process of data analysis.

Design

The phenomenological approach was used to study the common experiences of elementary teachers using word study developmental spelling instruction. Phenomenology is an approach to human science research that focuses on the description of experiences, while avoiding explanation and analysis (Moustakas, 1994). Rather than interpretation, phenomenology seeks to describe experiences as a whole with vivid and accurate detail. Across multiple subjects, phenomenology describes the authentic experiences in a real world context, providing clarity to everyday living (Moustakas, 1994).
Transcendental phenomenology refers to the approach to scientific exploration that recognizes subjectivity of observations and the influence of the researcher. Experience can only be described through the subjective interpretation of the researcher, because knowledge does not exist externally, but rather determined through conscious reflection and self-evidence (Descartes, 1977). The influential researcher, Edmund Husserl (1973) asserted that meanings are found through intentional experience, where humans make conscious decisions. Simply stated by Schutz (1967), everything we know about conscious knowledge is based on our own lived experiences. The transcendental phenomenological approach recognizes the human influence on experience and presents methods for subjective openness during research (Husserl, 1931).

The primary scientific evidence used in the transcendental approach is experience, which is achieved through thinking, intuition, and reflection (Moustakas, 1994). A critical component of transcendental phenomenology is the epoche, which refers to the researcher refraining from judgement to achieve the most objective standpoint possible. The epoche is an important first step in the research process in order to set aside bias and keenly observe the phenomenon of interest (Moustakas; 1994). Next in the process is Transcendental-Phenomenological Reduction, which describes how each experience must be looked at singularly, while focusing on in the essential constituents (components) of the human experience (Schmitt, 1968). The essential constituents are a sensory-based description of the experience, including the sounds, visuals, and feelings associated. The reduction process leads to the textual description, or the “what” of the experience. The third step is known as the Imaginative Variation, which concentrates on forming the structural description of the experience. This process identifies concepts across participants concerning “how” a phenomenon was experienced and the common shared meaning.
Finally, the textual and structural descriptions are synthesized to write an overall meaning and essence for the experience of interest.

For this study, the transcendental phenomenological approach as described by Moustakas (1994) was selected, because the descriptions of teacher experiences were more valuable than my interpretations as a researcher. As a teacher and literacy facilitator, I had bias regarding instructional practices, which I was able to address through the transcendental process. The epoche approach (Moustakas, 1994) was applied to bracket out my interpretations as a researcher and highlight the descriptions of teachers, administrators, and students, along with information explaining the teaching context and school environment.

The study was exploratory to determine obstacles and successes during word study instruction, instead of predetermined research goals. Phenomenological research is a valid approach to find meaningful themes across traditionally self-contained classrooms, especially considering the experiential nature of teaching and learning (Van Manen, 1990). Phenomenological studies are relevant in the education research field (Tesch, 1988), because teachers and students often share school experiences, despite differences in locations and resources. By interviewing teachers and enabling them to share their experiences, the education community can learn from one another and determine the best practices for spelling instruction (Moustakas, 1994).

**Research Questions**

The study was guided by the following central research question: What are the experiences of second grade elementary teachers implementing word study spelling instruction in their classrooms?
More specifically, the following sub-questions directed the study: (a) What are the common word study instructional challenges faced by teachers? (b) What instructional methods for word study are successful for teachers? (c) How do teachers address their word study instructional challenges? (d) What do different forms of administrator and student feedback suggest about teachers’ word study instruction? (e) How do teacher experience and professional development background influence word study instruction?

**Setting**

Northern Virginia Public Schools (pseudonym), referred to as NVPS, was the district participating in the study. The district contained over 55 elementary schools and represented a broad landscape of communities with urban, suburban, and rural sectors. The ethnic diversity of the student population included 52% White, 20% Asian, 17% Hispanic, 7% Black, and 5% Multiracial (NVPS, 2016). Elementary schools included grades kindergarten through fifth grade, along with additional programs warranted to educate English language learners, students with special needs, and preschool students.

A purposive sample, as described by Lincoln and Guba (1985), was utilized for this study, selecting a small number of participants who met certain criteria. In this purposive sample, participants were chosen from six specific elementary schools in Northern Virginia, representing different socioeconomic status levels. For example, some schools in NVPS were classified as Title I and received federal support based on high percentages of low-income families (U.S. Department of Education, 2014). In contrast, certain other schools brought students from gated country clubs with only high-income families. This spectrum of socioeconomic status (SES) levels presented a unique opportunity for this regional study to represent a range of participants.
NVPS provided site-based autonomy to principals and teachers to adapt their instruction to the needs of their population, while requiring certain instructional programs districtwide. For language arts instruction, NVPS expected the following consistencies across schools (NVPS, 2015):

- A minimum of 120 minutes of daily language arts instruction.
- Word study developmental instruction as the foundational spelling program following the second edition of Word Journeys (Ganske, 2013) and fifth edition of Words Their Way (Bear et al., 2011) systems.
- Writer’s workshop directed by the Lucy Calkins (2003) Units of Study writing series.
- Phonological Awareness Literacy Screening (PALS; Invernizzi et al., 2003) for all students K-2, excluding special education needs and high-benchmark students.
- Differentiated reading instruction with shared reading, guided reading, independent reading, and teacher strategy lessons.
- A balanced literacy framework with grade-appropriate instruction in spelling, writing, and reading.

Participants

A sample of 19 second grade teachers was selected across six elementary schools, which was a strong participation rate. The initial sample sought 15-20 teachers with the awareness that attrition may lead to a final group of 10-15, which would have been appropriate sample size to meet data saturation for phenomenological research (Creswell, 2013; Polkinghorne, 1989). The average class size for second grade in NVPS was 25.6 students and each second grade class was taught by a single general educator.
In addition to the schools selected, the sample was also be purposive as described by Lincoln and Guba (1985), by focusing on participants sharing a specific phenomenon. The goal was to recruit teachers who share a similar word study teaching experience. The purposive sample was recruited through the following process: (a) Schools were selected following initial interest surveys distributed to elementary school principals in NVPS. The responding schools were divided into three groupings based on SES levels (low SES/urban, middle SES/rural, high SES/suburban) of the local community; (b) Two schools were selected at random from each grouping, representing the different communities (six schools total). School sampling sought to present a more diverse student population; (c) Second grade teachers were recruited for participation. Grade level consistency enabled more direct comparisons of teaching experiences; (d) Only full-time, certified, general education teachers with support from their building principal were selected for the study; (e) All teachers had to be implementing the word study program at the time of the study and have completed some type of formal word study training. Acceptable word study trainings included required NVPS teacher training programs, NVPS evening optional courses, or University of Virginia graduate courses.

**Procedures**

To conduct this phenomenological study, multiple steps were be undertaken prior to data collection. This included acquiring Institutional Review Board (IRB) approval, eliciting participants, utilizing safe and effective data collection procedures, and implementing appropriate data analysis. Following approval of the research consultant and the dissertation committee, the research proposal was submitted to the Liberty University IRB. Only following IRB approval did data collection begin. Participant recruitment occurred through requests presented to teachers who have completed word study training programs. This created
consistency in background experience for participants. Teachers were contacted through emails and in-person requests at teacher meetings (e.g. trainings and workshops). A formal request letter was provided to all interested parties, explaining the purpose, time requirements, and participant safeguards for the study.

Data were recorded through multiple methods based on the collection format. Interviews were be audio-recorded with two devices, protecting against technical difficulties. The audio recordings were transcribed along with body language notes taken during the interview. Teacher journals were collected electronically, through a Google documents program, providing participants with a convenient method of private response. The data were analyzed through a process of triangulation, which as described by Schwandt (2007) involved checking the integrity of inferences drawn from data by using multiple sources and or methods. Triangulation was addressed through the multiple sources of teacher, administrators, and students, along with different methods through interviews, journaling, observations, and artifact analysis. Data analysis was conducted following the approach of Moustakas (1994), which included studying data to identify its structure, meaning configuration, and the clustering of themes to develop broader understandings. The seven–step process led to a deeper understanding of the essence of the word study instructional program demonstrated across school systems and classroom contexts. The seven steps included: (1) Description of personal experiences; (2) Horizontalization of the data; (3) Clustering and thematizing; (4) Identify invariants constituents and themes by application; (5) Textual description of the experience; (6) Structural description of the experience; (7) Presentation of the “essence” of the experience. These steps, explained in more depth in the data analysis section, both reflectively analyzed the researcher, as well as drew meaningful connections across multiple complex data sources.
The Researcher's Role

As the researcher, my teaching experience, graduate studies, and role as a literacy facilitator influenced my dissertation goals. I was a National Board certified, full-time, educator with 11 years of experience at the elementary level. I had previously taught first grade, second grade, and fourth grade and was working as an instructional facilitator concurrent to the study. I also served as a literacy facilitator in the district. In my role, I trained and assisted teachers with word study implementation in their classrooms. I was a certified reading specialist, specializing in guided reading, writing workshop, and word study instruction. My classroom experience and graduate studies enabled me to serve as facilitator to fellow teachers. My background included work with Title I schools, inclusion classrooms, and ethnically diverse communities. As a facilitator, I sought to advance the research in word study instruction and guide teachers to improve their instructional practices. I believe through detailed literacy studies, researchers could provide insight and experiential data to help teachers expand their understanding beyond standalone classrooms.

Working within the same school system as the participants, I had access to county curriculum and avenues for recruiting participants. I understood the common NVPS instructional standards and had been trained with the programs and resources used by the participants. I was highly invested in the literacy development of students, which provided me with motivation for an objective accounting of events.

Data Collection

As a qualitative study, inductive inquiry was utilized to obtain knowledge about the phenomenon. Considering inductive analysis does not involve direct empirical observation, trustworthiness is important during data collection to support findings. To promote
trustworthiness, triangulation was implemented, which involved collecting data from multiple sources to avoid the potential subjectivity of a single viewpoint (Patton, 2001). Interviews with teachers were the central form of data collection, but findings were also triangulated through multiple data collection strategies and sources (Creswell, 2013; Patton, 1990). The different strategies included interviews, observations, artifact analysis, and journaling. These strategies were scheduled at different times of the 2016-2017 study to provide a comprehensive exploration of the instructional process over time, observing how teachers planned and adapted their instruction based on the changing context.

- Semi-structured interviews (September/October) – The first data point was sit-down interviews to describe word study philosophy. Interviews were also held with school principals at each of the six participating schools.

- Journaling (October/November and February) – The second data point was teacher written responses, outlining initial word study practices to start the year. The second journal entry was the concluding views of each teacher, which highlighted change over time teaching word study.

- Observations (October – January) – Each teacher had a single classroom observation, providing authentic insight into word study practices. The window was lengthy (four months) due to the challenge of coordinating numerous observations at different school sites over the course of a school year.

- Unstructured interviews (October – January) – Before and after observations, these interviews provided accompanying data at a convenient time.

- Student work artifacts (October – January) – Upon each observation, artifacts of student work were sought to highlight key points from observations and interviews.
The range of sources incorporated data from teachers, administrators, and students, which sought to present multiple perspectives to fully describe the experience. The following descriptions explained the methods behind each data collection approach.

**Semi-Structured Interviews**

As a phenomenological study, interviewing is a typical collection strategy to gather data from individuals who have experienced a specific phenomenon (Creswell, 2013; Polkinghorne, 1989). This study sought to explore the experiences of teachers using word study, which made interviewing teachers a logical information source. As recommended by Moustakas (1994), the interview sought to explain how the participant experienced teaching word study and what school contexts and classroom situations affected the experience.

Audio-recorded 10-20 minute semi-structured interviews were held with the 19 teachers and the overseeing principals. Semi-structured interviews were utilized to provide qualitative responses and detailed narratives using open and direct questions, rather than structured interviews, which use closed questionnaire formats that elicit quantitative data (DiCicco-Bloom & Crabtree, 2006). The semi-structured format required research and preparation to plan questioning, while respecting the knowledgeable interviewee through a flexible and responsive interview process. The semi-structured format followed the process outlined by Whiting (2008) to build rapport and achieve meaningful data:

- Apprehension phase: Engage in general conversation, which is connected to the research study, but open-ended and nonintrusive.
- Exploration phase: Seeking more in-depth descriptions through probing questions that seek insight into experiences.
• Co-operative phrase: When a level of comfort is reached, the interview becomes more of a two-way process, where the interviewer can share personal information, leading to increased confidence in the interviewee that enables more sensitive questioning.

• Participation phase: A point not always reached in an interview, but includes the interviewee guiding the discussion and teaching the interviewer valuable information.

• Interview conclusion: Ending at a time when both people feel comfortable in which the interviewee is thanked and shown appreciation for their efforts.

All interviews were audio-recorded and saved in MP3 format using both a laptop computer and smartphone. The audio files were stored to the Office 365 OneDrive cloud storage of my Liberty email account, which allowed for export into the ATLAS.ti software program. Smartphone recorded back-up files were also be stored to the Office 365 Onedrive. Recorded interviews were transcribed verbatim for coding and thematic analysis, assisted by the ATLAS.ti software program.

Interviews followed the questioning process listed in Appendix B. These questions were be piloted prior to official data collection with five elementary educators who had familiarity with word study. As recommended by Fassinger (2005), the piloting process was used to add, delete, or alter questions to avoid truncated or confusing participant responses. The process of piloting interview questions also sought to provide face and content validity, because the interview was uniquely designed for this study. Face validity refers to whether the purpose of the study is clear based on the interview questions (Nevo, 1985). Content validity describes the extent to which the interview is a relevant measure of the construct of interest (Haynes, Richard, & Kubany, 1995). This semi-structured interview format was used to predominantly address the
central research question: “What are the experiences of second grade elementary teachers implementing word study spelling instruction in their classrooms?” The flexible format created a comfort level between the interviewer-interviewee that encouraged honest and open responses (Whiting, 2008), and allowed for more in-depth interviews that collected a comprehensive amount of data.

**Teacher Journaling**

In addition to interviews, teachers also responded in writing to reflective prompts. Teacher reflection on experience has been historically recommended practice by education scholars such as Dewey in 1933 (Palmer, Burns, & Bulman, 1994) and into the twenty-first century (Klopper, 2000). For this study, the term “reflection” was defined by Boud and Walker (1991) as a process of intellectual engagement to explore experiences leading to novel understandings and appreciations. Journaling has been suggested to be a more objective form of reflection, because it provides distance between the person and the situation, while allowing contemplation over past events (Patterson, 1994; Wong, Kember, Chung, & CertEd, 1995).

Although interviews are commonly the main method of data collection for phenomenology, other forms of data such as journals can be valuable to frame the experience with multidimensionality (Van Manen, 1990). For teachers potentially uncomfortable with the in-person interview format, journaling can enable them to collect their thoughts and respond comfortably. Taking into consideration Gardner’s (1983) multiple intelligences, people have different sensitivities and abilities, which is why it is important to format the study with different methods of interaction. Certain teachers may be more interpersonal and prefer one-on-one interviews, while others may be more verbal linguistic and excel responding to questions in
writing. Teacher journaling addressed the same research questions as interviewing and helped to understand the challenges, successes, and strategies of teachers.

Writing was completed through an online database and allowed flexibility for teachers to complete responses in school or at home. Teachers journaled about their spelling philosophies, based on instructional experience, professional training, and college coursework. Teachers wrote two to three paragraph responses during a window of time early in the school year (October/November) and the end of the second marking period (February).

**Classroom Observations**

As explained by Creswell (2013), observation is one of the key tools for collecting qualitative data. The process involves the researcher recording sensory-based field notes about a phenomenon (Angrosino, 2007), which are based on the purpose and questions of the study. According to Schwandt (2007), field notes are the raw data or material collected in the setting of interest based on observations, conversations, and interactions. Field notes provide the “evidence on which inquirers base claims about meaning and understanding” (Schwandt, 2007, p. 115). For a phenomenological study, field notes are valuable to draw conclusions regarding the textual description of the experience.

During the course of the school year (October – January), classroom observations were scheduled to view teachers implementing word study instruction. Observations of teachers at a single school site were conducted on the same instructional day to maximize the efficiency of data collection. Observations were conducted following a Classroom Observation Protocol (see Appendix A) to provide a level of consistency to the process. The Classroom Observation Protocol was adapted from the work of Creswell (2013), which includes sections for descriptive and reflective notes during an observation. In the educational setting, the descriptive sections of
the protocol sought to summarize the classroom activities (field notes), while the reflective sections included inferences, analysis, and conclusions. Observations were recorded in chronological order with consistent time stamps every five to seven minutes for a detailed description. In addition, sketches of room layouts were utilized to visually document the classroom setting.

As the observer, I scheduled observations that demonstrated different weekly activities when possible. This approach a broader view of word study and recognized the practicality of scheduling lessons with 19 very busy teachers. Observations took place during the introductory sort, weekly sorting activities, or end of the week assessment.

By observing instructional practice, the study collected another data point to complement the interviews and written responses of teachers. It enabled an analysis of the connection between the thoughts and views of teachers and their classroom experiences and whether the actions of teachers matched with their words. Teachers presented a certain philosophy and persona during interviews, while acting differently when teaching a group of students.

Classroom observations were useful data collection procedures to address the research questions regarding the challenges and successes teachers experienced teaching word study. Rather than relying solely on teacher reporting, I was able to witness word study teaching in action and collect field notes.

**Unstructured Interviews**

Considering the value of interviews in phenomenological research (Creswell, 2013), accompanying formal interviews with unstructured interviews balanced the data collection process and provided additional interactive data. These exchanges were collected during and after instructional observations and provided insight into classroom practices. The interviews
were unstructured and flexible to allow for questions in response to events observed during word study lessons. As described by Whiting (2008), unstructured interviews were considered guided conversations with key informants that followed an emerging list of questions developed during the dialogue. Interviews were held in the classroom during an instructional break or in a school conference room removed from the students. Intending to be brief reflective conversations, interviews were only be 5-10 minutes in length and included 6 questions. Teacher comments were audio-recorded with two devices (smartphone and laptop) to ensure data protection in the face of a technology failure. Notes were recorded during the interviews regarding body language that complemented the data transcribed from recordings. As with the semi-structured interviews, these conversations addressed the central research question about teacher experience and the three sub-questions analyzed teachers’ challenges, successes, and adaptations.

**Student Work Artifacts**

Student work artifacts were collected to supplement lesson observations and unstructured interviews to provide another source of data. Artifacts are products of human workmanship carrying meaning about the culture, which can include student works demonstrating learning (Schwandt, 2015). In this study, student artifacts represented the culture of the classroom and student understanding of word study spelling features. At least one student artifact was collected from each participant’s classroom, including spelling tests, word study classwork, and written work. During unstructured interviews, requests were made when appropriate for student work artifacts to illustrate points made by the teacher interviewee. For example, when a teacher described using a multiple skill formative assessment, I requested to have a copy of the assessment form (Tracy, observation artifact, December 16, 2016). During interviews, I also requested student artifacts to support important observations, which could more fully detail the
classroom situation. For example, when I saw a teacher instructing the vocabulary component of a word study list with a student, I requested a sample of the student’s classwork (Erika, observation artifact, December 5, 2016).

Artifacts were only gathered with permission of the teacher. Parent permission was not required as all student data was collected anonymously. Student names were removed from artifacts and replaced with pseudonyms to protect confidentiality. Artifacts did not need to be original copies, rather photocopies, or in most cases photographs. Teacher comments and analysis were incorporated into the meaning determination process for each artifact. This form of data collection supported the central research focus describing the teacher experience, but also directly addressed the student-focused sub-question: “What do different forms of administrator and student feedback suggest about teachers’ word study instruction?” Authentic student work provided an objective form of data to describe the student spelling experience in comparison to the viewpoints of teachers and administrators inferring student actions.
Data Collection – Research Questions Addressed

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Data Analysis

Data analysis procedures were planned and purposeful to identify the full meaning of the word study experience for teachers. To aide in the data analysis process, the ATLAS.ti program was utilized for clustering, coding, and thematizing data. The ATLAS.ti program did not determine key clusters, codes, and themes, but rather served as an organizational tool for the researcher to study the data. Regarding the specific analysis process, the following seven steps of phenomenological analysis were utilized, based on the process outlined by Moustakas (1994).

1. Description of Personal Experiences

Also known as the epoche, this reflective process states the background and professional experience of the author. The purpose of the epoche is for the researcher to “set aside prejudgments, biases, and preconceived ideas” (Moustakas, 1994, p. 59), or in other words,
inhibit prior knowledge and experience related to the topic (Schmitt, 1968). The epoche process in theory enables the researcher to “bracket” preconceived ideas to remain more objective when studying a phenomenon (Moustakas, 1994).

For this study, the epoche (see Appendix I) involved a full description of my personal experiences teaching word study at multiple grade levels, which included three years in second grade. The epoche sought to separate personal experiences from the study by informing the reader to make their own judgments about potential bias (Creswell, 2013). In addition, a specific list of my presuppositions were “bracketed” in writing prior to conducting the study.

2. Horizontalization of the Data

Careful review was conducted for the collected data to identify significant statements. This process, called horizontalization, highlighted the important quotes from the transcript that represented the meaning of the experience. For this study, the important statements described positive learning moments and roadblocks to word study implementation. Horizontalization organized the data into non-overlapping statements that enabled clearer interpretation. As outlined by Moustakas (1994), during horizontalization, each phenomenon identified was given equal value for continued analysis.

3. Clustering and Thematizing

During clustering, significant statements were reviewed across participant data to identify commonalities in experience. Although the study was examining a unique experience, participants shared certain “significant, relevant and invariant meanings” (Moustakas, 1994, p. 130) that defined the phenomenon. The commonalities were reviewed altogether to code themes that summarized the data. Coding is a process of disaggregating data into units for further analysis. The coded units were labeled for management, allowing the continued sorting of
further data inputs. As described by Schwandt (2015), data coding was not a fixed mechanical process, but rather a process that developed with evolving codes based on new findings.

Thematic analysis was an effective approach for qualitative research, because a specialized procedure did not exist to extract meaning from the data (Schwandt, 2015). By reviewing teacher and administrator interviews, I found clusters of meaning both positive and negative for teaching word study. Clusters of meaning became the main themes summarizing the overall experience.

4. **Identify Invariants Constituents and Themes by Application**

Themes were finalized as each invariant constituent and associated theme was reviewed for each individual participant interview. As described by Moustakas (1994), each theme was evaluated using the following process:

- Is the theme explicitly present in the interview?
- Is the theme compatible with the interview?
- Is the theme relevant to the interview?

The themes were then reviewed with the data as a whole to evaluate their representativeness of the larger sample of teachers. Themes were augmented with quotations from the transcript to lessen interview misinterpretation.

5. **Textual Description of the Experience**

This interpretation included a textual description analyzing “what” the participants experienced. The textual description included what methods the teachers used when implementing word study and the learning outcomes for students within the classroom context. The goal of this description was to present an objective observable summary of the experience.
6. Structural Description of the Experience

This interpretation included a structural description about “how” the phenomenon was experienced. The structural description moved beyond observation and instead sought to outline the thoughts and emotions of the experience for participants (Moustakas, 1994). For this study, the structural description extracted the feelings of the participants as they taught word study and addressed their views concerning daily challenges and achievements.

7. Presentation of the “Essence” of the Experience

This analysis incorporated the structural and textual descriptions into a combined summary of the phenomenon. The “essence” included statements that are universally shared for the experience, which are identified through the reports of multiple individuals. For this study, a collective overview of the word study experience across teachers outlined the major themes for implementing the program. The essence included a detailed description of how word study was coordinated in the classroom, while highlighting common thoughts and emotions for teachers.

Ongoing Data Analysis Procedures

Ongoing during the data collection process, I practiced memoing to document my evolving research theories. Memoing is a procedure recommended by Barney Glaser (1978) that includes describing the data collection and analysis process, while capturing my thoughts as the researcher. Memoing occurred following each observation and interview, along with any notable conclusions over the course of the study. These memos, written to myself as the researcher, were also be a reminder of my mindset at the start of the study, which was compared with my changing views over time (Creswell, 2013).
Trustworthiness

Trustworthiness is a critically important characteristic of quality research. As defined by Lincoln and Guba (1989), this phenomenological study applied multiple strategies to promote credibility, dependability, transferability, and confirmability. These strategies included prolonged engagement, data triangulation, consistent engagement, member checking.

Credibility

Credibility refers to whether the research truthfully and validly represents the phenomena under study (Lincoln & Guba, 1989). Credibility was promoted in the study through prolonged engagement and the triangulation of data. Both strategies were implemented through the course of the data collection process.

As recommended by Lincoln and Guba (1989) and Erlandson, Harris, Skipper, and Allen (1993), prolonged engagement describes ongoing interaction between the researcher and the participants to gain a more complete understanding of the culture and build a trusting relationship. The complexity of a school with multiple parties (students, teachers, and administrators) and classroom influences (e.g. resources, content areas, student needs) could not be studied effectively through a single observational snapshot. Prolonged engagement was warranted to get a more valid understanding of the instructional experience.

The triangulation of data is the process verifying observation by using multiple sources of data and/or different data collection methods. As explained by Patton (2001), qualitative research is a process of inductive analysis that is open to interpretation and triangulation of data is critical to increase the validity of findings. As noted by Brewer and Hunter (1989), although different data collection strategies have shortcomings, utilizing multiple methods can compensate for limitations and provide a comprehensive and multifaceted analysis.
Triangulation in the terms of multiple informants is another highly valuable verification method. As encouraged by Van Maanen (1983), data points should be checked through multiple parties, because each individual participant has a subjective view, which may contrast with other perspectives and/or not truly represent the essence of an experience.

**Prolonged engagement and persistent observation.** The research process included an 18-week observation of all 19 elementary classrooms. Consistent engagement took place throughout the study by incorporating observations, interviews, and teacher journaling at different points in time. Extended engagement helped avoid erratic data that could have misrepresented the participants’ experience (Lincoln & Guba, 1989; Erlandson et al., 1993). This engagement presented valuable access to data, but I had to be self-aware of becoming too connected and allowing my judgement to be influenced (Silverman, 2000).

**Triangulation.** The main data emphasis was on interviews with teachers, but interviews were corroborated with other forms of information. Teacher interviews were triangulated with additional data sources from principals and student artifacts (anonymous) to provide a range of perspectives. As recommended by Van Maanen (1983), this approach did not only include the teachers delivering instruction, but the students engaged in learning and the administrators overseeing classroom practices. Triangulation was also be addressed through multiple collection strategies, including interviews, observations, journals, and artifacts. Each approach filled in the gaps of others, as noted by Brewer and Hunter (1989), because they analyzed the teacher experience in different ways. Journaling enabled teachers to contemplate their responses in writing, comparing to interpersonal interview settings. Observations also presented a real-life view of word study practice, which at times conflicted with the comments of a teacher. Overall, triangulation enabled multiple perspectives and a range of data formats to shape the study.
Dependability

Similar to reliability, dependability refers to if a study were repeated again, whether the same results would be found (Lincoln & Guba, 1989). Dependability was addressed by member checking results and analysis, while also selecting representative quotations.

Member checking. This process sought feedback from the participants regarding the accuracy of data collection and analysis. Teachers provided feedback about significant themes found in data and evaluated correctness of transcribed interviews. The writ large approach added a critical level of scrutiny by allowing participants to review the report to judge accuracy and respond (Lincoln & Guba, 1989).

Selecting quotations. Using the transcripts of recorded interviews, quotations were included to accurately represent and articulate findings. By using exact quotations, the participants own words supported findings, which lessened the probability for misinterpretations.

Transferability

Transferability describes whether the findings from a study are generalizable to the wider population (Lincoln & Guba, 1989). As a qualitative study, the experiences sought to represent the specific targeted sample of second grade classroom teachers teaching word study. Transferability was attended to through rich, thick descriptions and clear explanations of the boundaries of the study.

Rich, thick descriptions. The study provided descriptions of each teacher’s background, the school setting, and the literacy development of students. In contrast, brief and/or unspecific accounts would have been difficult to evaluate and potentially masked faulty research. The descriptiveness of data reporting was critical to the qualitative analysis process (Patton, 2001).
Clear boundaries of the study. For the audience to attempt the transference of findings, the researcher must specifically state the boundaries of the study. By descriptively listing the parameters of the study, the reader can make their own judgements. Parameters can include the participants, data collection methods, length of data collection, and time period (Cole & Gardner, 1979; Marchionini & Teague, 1987), which were included in this study.

Confirmability

Confirmability refers to whether a study, upon accurate replication by another person, would reach the same results (Lincoln & Guba, 1989). Confirmability was promoted through peer review and an enumeration process during post analysis.

Peer review. Prior to publication, the research process will be externally checked by at least two peers in the education department at Liberty University. Peer review will serve as an objective evaluation, providing critical feedback to improve the study’s accuracy and authenticity.

Enumeration. The process of enumeration refers to counting the number of observations of a particular data point during analysis (Dey, 2003). Considering the numerical focus and statistical basis, enumeration has quantitative analysis elements, but the method of defining the boundaries for each data point is implicit (Dey, 2003). For example, when a researcher is counting the number of times a student misbehaves during a classroom activity, the definition of “misbehavior” is determined by the researcher.

For this study, the enumeration results were calculated and presented in table form in the final publication. Data points were enumerated for notable themes for the word study instructional experience recognized across participants, whether occurring in observations,
interviews, and/or journal entries. Enumeration provided more specific evidence behind the identified themes for reader interpretation.

**Ethical Considerations**

In qualitative research, ethical issues exist prior, during, after conducting a study (Creswell, 2013). Ethical issues arise from the researcher’s role as insider/outsider based imbalanced power relationships and participant fear of disclosing (Weis & Fine, 2000).

**Prior to Research**

Prior to meeting with school principals and teachers, I gained permission from NVPS central office. To be sensitive to needs of vulnerable populations (e.g. students), I remained a nonintrusive observer in each elementary classroom (Hatch, 2002). Finally, before collecting any data, I received Institutional Review Board (IRB) approval from Liberty University. IRB approval was achieved through submitting the required application (see Appendix D) to the Liberty University office describing the research procedures outlined in my study proposal.

**During Research**

Ethical issues must be considered to protect participants during data collection (Lipson, 1994). Teachers and administrators were aware of the study and informed consent documents were collected from all parties prior to involvement. Informed consent (Schwandt, 2015; Bosk & DeVries, 2004) refers to the rights of the participants to know:

- They are being researched.
- The risk and benefits of the study.
- The general nature of the study.
- They have the right to withdraw at any time.
- Participation in the study is voluntary.
Furthermore, participants have a right to privacy, including all forms of collected data. All participants, locations, and names of schools were pseudonyms to protect confidentiality.

**During Analysis and Publication**

To avoid “using” participants without giving back, I will make a point to benefit the local school system by providing copies of the report to all participants and assisting central office and/or school principals in planning professional development for the school system following the study. Information about teacher instructional methods will be kept anonymous to prevent negative judgments of teachers in the public arena (Creswell, 2012). The physical data will be stored in locked box in a secure location, while electronic data will be double-password protected on an electronic database. This confidentiality is critical, because if teachers feared sharing their true experience teaching word study, the data would have lacked validity when describing the phenomenon. Following data analysis, but prior to publication, member checking occurred to enable teacher and principal input. Working closely with participants avoided misrepresentation of the experience by the author as well as made the data a learning tool for teachers.

**Summary**

Chapter three explained the specific methods for this research regarding word study, including the researcher’s role, data collection, analysis, trustworthiness, and ethical considerations. The data analysis of this of phenomenological study of word study instruction followed a detailed and methodical approach. The seven-step approach from Moustakas (1994) achieved a comprehensive description of the common experience. While seeking meaningful and worthwhile findings, trustworthiness was maintained through numerous strategies for addressing credibility, dependability, transferability, and confirmability (Lincoln & Guba, 1989).
Finally, ethical considerations were evaluated before, during, and after data collection to protect the rights of participants and benefit the community influenced (Weis & Fine, 2000). Next, chapter four will list the findings of the study, including the specific results from the multiple forms of data collected.
CHAPTER FOUR: FINDINGS

Overview

The goal of this transcendental phenomenological study was to understand the instructional experience of second grade teachers using the word study spelling program, including a description of the common challenges and solutions. This chapter initially discusses the demographic information and background of the study’s 6 schools and 19 participants. After outlining the background of the sample, the results are presented through the study’s five research sub-questions, which are aligned to the theoretical framework and central question of the study: What are the experiences of second grade elementary teachers implementing word study spelling instruction in their classrooms? The common themes identified across data points are discussed in the context of the research questions.

Following the identification of initial themes of word study instruction, a textual description (“what”) and structural description (“how”) is presented. The concluding findings section combines the two descriptions into a summary statement of the “essence” of the overall experience.

Participants

Purposeful sampling was utilized to recruit second grade teachers from six schools in the Northern Virginia Public Schools (NVPS) (pseudonym) system. Schools represented three different socioeconomic status (SES) groupings: low SES (Harris and Thomas) (pseudonyms), middle SES (Dale and Eagle Hill) (pseudonyms), and high SES (Dover and Newport) (pseudonyms). Second grade teachers were contacted to take part in the study, resulting in three-to-four participants from each school. Signed consent forms were collected from all 19 participants (see Appendix D), along with their supervising principals. The sample group
included only full-time, certified teachers with at least one year of experience. All teachers had some level of word study training (e.g. county training or college course) and had plans to implement word study for the 2016-2017 school year. Pseudonyms were attributed to the school system, individual schools, teachers, and names of others, such as students and colleagues. Pseudonyms were referred to during data collection, to ensure confidentiality of both the setting and participants. Gender and race were self-reported during semi-structured interviews (see Appendix A) held in person. Class sizes and English language learner (ELL) populations were determined through fall surveys (see Appendix B) and classroom observations (see Appendix C). Class ELL populations were categorized based on the following population ranges:

- High ELL population: Greater than 11 ELL students
- Moderate ELL population: Between 5 – 10 ELL students
- Small ELL population: Between 1 – 4 ELL students
- No ELL population: 0 ELL students

School size and percentage of students identified as economically disadvantaged and with Individualized Education Programs were researched using public data listed in NVPS School Profiles (NVPS, 2016). Economically disadvantaged is determined by the school system based on whether a student qualifies for free or reduced-price lunch programs. Socioeconomic status groupings (School SES) were classified based on the following ranges:

- High SES: Less than 20% economically disadvantaged
- Middle SES: 20-60% economically disadvantaged
- Low SES: Greater than 60% economically disadvantaged

For a complete view of the sample, Table 1 describes the collective demographic data of the participants in the study.
Table 1

Participant Demographic Information

<table>
<thead>
<tr>
<th>Teacher (Pseudonym)</th>
<th>Gender</th>
<th>School (Pseudonym)</th>
<th>School Size</th>
<th>Econ Dis %</th>
<th>School SES</th>
<th>IEP %</th>
<th>ELL %</th>
<th>Teacher Race</th>
<th>Class Size</th>
<th>Class ELL Pop.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Erika</td>
<td>Female</td>
<td>Eagle Hill</td>
<td>890</td>
<td>16%</td>
<td>High</td>
<td>16%</td>
<td>19%</td>
<td>African American</td>
<td>18</td>
<td>None</td>
</tr>
<tr>
<td>Marie</td>
<td>Female</td>
<td>Eagle Hill</td>
<td>890</td>
<td>16%</td>
<td>High</td>
<td>16%</td>
<td>19%</td>
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<td>19</td>
<td>Moderate</td>
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<td>16%</td>
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</tr>
<tr>
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<td>Eagle Hill</td>
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<td>16%</td>
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<td>16%</td>
<td>19%</td>
<td>White</td>
<td>18</td>
<td>Small</td>
</tr>
<tr>
<td>Tina</td>
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<td>Dale</td>
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<td>20%</td>
<td>Middle</td>
<td>17%</td>
<td>16%</td>
<td>White</td>
<td>22</td>
<td>Small</td>
</tr>
<tr>
<td>Kate</td>
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<td>Dale</td>
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<td>20%</td>
<td>Middle</td>
<td>17%</td>
<td>16%</td>
<td>White</td>
<td>21</td>
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</tr>
<tr>
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<td>17%</td>
<td>16%</td>
<td>White</td>
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</tr>
<tr>
<td>Matt</td>
<td>Male</td>
<td>Dover</td>
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<td>30%</td>
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<td>20%</td>
<td>24%</td>
<td>White</td>
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</tr>
<tr>
<td>Donna</td>
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</tr>
<tr>
<td>Tiffany</td>
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<td>White</td>
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<td>High</td>
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<td>8%</td>
<td>White</td>
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<tr>
<td>Brianna</td>
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<td>Newport</td>
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<td>4%</td>
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<td>4%</td>
<td>High</td>
<td>9%</td>
<td>8%</td>
<td>White</td>
<td>22</td>
<td>Small</td>
</tr>
<tr>
<td>Steve</td>
<td>Male</td>
<td>Thomas</td>
<td>586</td>
<td>76%</td>
<td>Low</td>
<td>10%</td>
<td>69%</td>
<td>White</td>
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<td>Large</td>
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<td>Taylor</td>
<td>Female</td>
<td>Thomas</td>
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<td>69%</td>
<td>White</td>
<td>26</td>
<td>None</td>
</tr>
<tr>
<td>Rita</td>
<td>Female</td>
<td>Thomas</td>
<td>586</td>
<td>76%</td>
<td>Low</td>
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<td>69%</td>
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</tr>
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<td>Low</td>
<td>7%</td>
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<tr>
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<td>Low</td>
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<td>77%</td>
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</tr>
<tr>
<td>Laura</td>
<td>Female</td>
<td>Harris</td>
<td>581</td>
<td>82%</td>
<td>Low</td>
<td>7%</td>
<td>77%</td>
<td>White</td>
<td>26</td>
<td>Large</td>
</tr>
</tbody>
</table>


**Eagle Hill Elementary**

Eagle Hill Elementary (pseudonym) was a newer school in the NVPS system, built in 2013 with a two-story model to accommodate 890 students. It had the next to highest school population in the sample and a connectedly large second grade team with seven teachers. Four female teachers volunteered to participate in the study with class sizes ranging from 18-22 students. In terms of experience, the team had different backgrounds with less experience for Betty (2 years) and Marie (7 years), and more experience for Melissa (13 years) and Erika (25 years). Eagle Hill was a higher SES school with only 16% of its student population classified as economically disadvantaged. The ELL population was a moderate 19%, but the students were not divided evenly between second grade classes. Betty and Erika did not have any ELL students, while Marie and Melissa had higher populations (eight and four). In contrast, 16% of students had Individualized Education Programs (IEPs) making it one of the higher special education populations in the sample.

Although the second grade team was large, the grade level collaborated when teaching word study to improve practice and make instruction manageable. As explained by Melissa, “. . . we sat down and put together tests for all of the, all of the sorts, so that’s done. We also put all the words on flipcharts, so that it made it easy to teach. . .” (Melissa, teacher interview, September 9, 2016). By switching students between classrooms, the team was able to provide a wide range of word study lessons at different levels in a more effective manner. Marie described how her team addressed the challenges in differentiation as follows:

I thought it would be (challenging), but the way that our team organizes it much easier, because I am just teaching one sort, I am giving just one test, I’m just grading one test.
So it’s pretty easy, but umm I think if we didn’t switch it would be much more difficult for sure. (Marie, teacher interview, September 16, 2016)

Using common diagnostic assessments, the teachers homogenously grouped students based on their word knowledge. Then during an established weekly time (e.g. 8:20 a.m.), teachers sent students to other classrooms for ability-based word study instruction. This approach provided a path to address a wide range of ability levels at Eagle Hill considering the high SES population along with needs in ELL instruction and special education. Students switched between classrooms at the start of each week for a word sort introductory lesson and the end of the week for a summative assessment of the specific sort. Teachers conducted mid-week daily practice within homerooms during the language arts block. Erika expressed her appreciation of this collaborative approach as follows, “This past year, was my biggest success in teaching word study, because we divide the students up. I actually am able to teach word study the way it’s meant to be taught” (Erika, September 2, 2016). Team collaboration enabled students to receive more specific differentiated instruction, while making word study manageable for teachers like Erika.

Dale Elementary

Built in 1999, Dale Elementary (pseudonym) was an established school in a suburban area of NVPS with 828 students. It had the third highest student population in the sample with six teachers at the second grade level. Three experienced teachers (5+ years) participated in the study with class sizes between 20-22 students. Dale was a middle SES school with 20% of the students receiving free or reduced–price lunch services. The population of IEP students was considerable at 17%, along with 16% of students designated as ELLs. Although ELL students...
were not evenly distributed across classrooms, as teachers Tina and Tracy did not have any ELL students, while Kate had a small group (3 students).

Although Dale had experienced teachers using word study for many years, the program was loosely coordinated across classrooms. Teachers shared elements of the word study program, such as assessment templates and activity ideas, but students remained in their homeroom for instruction. Furthermore, teachers uniquely coordinated weekly activities and routines, based on stylistic preferences and student needs. For example, in Tina’s class, she explained, “I actually have a book for the quarter and there’s activities to do each day with a menu” (Tina, teacher interview, September 15, 2016). The comprehensive word study notebook used developmentally aligned assignments including dictionary usage, graphic organizers, and sentence writing. Kate in contrast used vocabulary sheets, vowel pattern poems, and website activities as part of her program (Kate, observation, October 17, 2016). Overall, the foundational aspects of word study were maintained by the team, including diagnostic assessments, word feature sorts, and homogenously skilled groups.

Dover Elementary

Dover Elementary (pseudonym) was one of the older suburban schools in the NVPS system (est. 1989) with a smaller single-story building and a population of 630 students. Grade level teams were not very large and five teachers worked on the second grade team. Three teachers volunteered for the study with class sizes in the moderate range of 22-23 students. Two female teachers, Donna (10+ years) and Tiffany (15+ years) were veteran members of the grade level, while the younger male teacher Matt was starting his fourth year. Dover Elementary was a middle SES school with 30% of its students categorized as economically disadvantaged. Dover had the highest population of students with IEPs at 20% and a considerable ELL population at
25%. ELL students were mostly concentrated in certain classrooms, such as Donna’s (13 students) and Matt’s (11 students), while Tiffany had only 4 students.

The sample of grade level teachers maintained consistency to the foundational aspects of word study, such as differentiated grouping, targeted word knowledge instruction, and weekly summative assessments. In contrast, collaboration was not a main team focus, considering students did not switch between classrooms and teachers used varied instructional methods for homework, centers, and weekly assessments. In general, Dover’s second grade teachers incorporated word study uniquely within their language arts block and make independent instructional choices based on their professional judgement. For example, Donna described changes she made over the years as follows:

“It’s been different every year, just um, I don’t know, this year I’m trying something different with the little homework booklet that I hadn’t tried in previous years I’ve tried the bingo activity, I’ve tried set assignments Monday, Tuesday, Wednesday, Thursday. This year I’m just trying these little booklets that have different activities every week.”

(Donna, teacher interview, September 19, 2016)

A different approach was taken by the other two teachers, who had made adaptations to their word study model, moving away from homework and greater emphasis on classroom time. Matt, who incorporated word study into his literacy centers, preferred this new method because it “gives them ownership and taking practice tests with partners supports students who lack support at home” (Matt, post-observation interview, January 9, 2017). For Tiffany, she described removing homework as follows:

“Ok, so I’ve changed it this year, I found last year, as I have them doing the activities in the classroom and I send home on Thursday nights for them to practice. But on Monday,
they get new words, they also get a list of words to take home with them on Monday. But their spelling books stays here through, Thursday, and they take it home. (Tiffany, teacher interview, September 19, 2016)

All three teachers face similar challenges in terms of homework completion and test preparation, but their responses were uniquely different. Donna implemented a new homework booklet system, while Matt and Tiffany deemphasized homework. This situation represented some of the variation of instruction across the grade level.

**Newport Elementary**

Newport Elementary (pseudonym) was a comparatively older school in the heavily developed suburban section of NVPS (est. 1999). Newport had the largest school population with 961 students and class sizes ranged from 22-26 students. The community of Newport had the highest SES as only 4% of students were classified as economically disadvantaged. Populations of ELL students (8%) and students with IEPs (9%) were also small. For specific classrooms, teachers Rachel and Brianna did not have any ELL students, while Lucy had only a small group of two students.

The Newport sample of three teachers had considerable experience with Lucy working for 10 years in the school, while Rachel and Brianna had each taught for over 20 years. Each teacher independently planned and coordinated her language arts block, including word study instruction. Core word study elements were consistent (e.g. groups, sorting, assessment), but strategies and activities varied between classrooms. Differences in classroom practices were illustrated during observations. Brianna had students building words using pipe cleaners and magnetic letters as part of a literacy center rotation (Tiffany, teacher interview, December 15, 2016). Rachel’s classroom in contrast had students sorting words and recording in notebooks as
a full-class morning work activity (Rachel, observation, January 11, 2017). Each teacher made independent choices about the where, when, and how to implement word study.

The high SES community of Newport Elementary was active and engaged in school programs and classroom support. In Lucy’s classroom, during an instructional observation, she was able to assess three groups of students simultaneously using the support of a special educator and a parent volunteer (Lucy, teacher observation, December 16, 2016). Overall, classroom volunteers served a role in multiple word study activities, such as group assessments and literacy centers.

**Thomas Elementary**

Thomas Elementary (pseudonym) was one of the smallest (586 students) and oldest (est. 1975) schools in the sample. Although the overall school population was low, class sizes were highest in the sample as all participating teachers had 26 students. Located in the more comparatively urban section of the NVPS system, Thomas Elementary was a Title I school, receiving federal support to aid the low-income community, which included 76% of students identified as economically disadvantaged. Thomas also had a high ELL population (69% of students), using Title I funding to support staffing and materials to address language barriers. The percentage of students being serviced with IEPs was a lower 10% of the school population.

The second grade team included four teachers and three were willing to participate in the study. All three teachers brought over 10 years of teaching experience entering the school year and the grade level collaborated consistently for lesson planning and resource sharing. Collaboration was a main component of the team’s word study methods for weekly sort instruction and assessment. Using word study diagnostic assessments, the team compared scores across the grade level and homogenously grouped students based on orthographic knowledge.
During a predetermined time (8:15 a.m.), teachers had their students report to different classrooms teaching specific sub-skills that matched their needs. As noted during classroom observations, Steve taught a sort comparing short “e” vowel sounds (e.g. *bet*) with multiple long “e” vowel patterns (e.g. *meet*) (Steve, teacher observation, January 17, 2017), while Taylor taught a list comparing initial consonant blends with letters “f” and “r” (e.g. *fl-, fr-, cl-, cr*) (Taylor, teacher observation, January 19, 2017). This coordinated system for differentiation was a point of success for teachers:

I think when we differentiated the groups and really honing in on what children needed and teaching them at their level. I think that was a success. So if they needed short vowels, they got short vowels. I had a high group, I was teaching a little bit accelerated, um so that they weren’t getting the same thing over that they knew. So I think that was a benefit to differentiate and to meet them where they are. (Taylor, teacher interview, October 11, 2016)

To enable such a cooperative effort, the team also decided to extend their word study schedule to a two-week period in which words were introduced on a Monday and then assessed the next Friday (11 days later). Using this format, the teachers were able to more efficiently address the wide range of abilities influenced by language barriers and economic challenges. The advantage of providing more time for word sort instruction was explain by Steve:

That it gives them more time and we really, I think you know, I kinda embarrassed to admit this, but I think I taught it a for a lot of years assuming that when they see CVC that they know what that means. And this time I’m really making sure that they do, because that’s important or you know it doesn’t mean anything.

(Steve, teacher interview, September 19, 2016)
Steve recognized that in the past, he rushed to teach the consonant-vowel-consonant (CVC) pattern and some students lacked understanding, but this new method enabled him to teach for deeper meaning.

**Harris Elementary**

Harris Elementary (pseudonym) was a unique school in the sample, standing as the oldest (est. 1966) and smallest school (581 students). Furthermore, Harris had the largest populations of economically disadvantaged (82%) and ELL students (77%). Connected to these community needs, Harris had been identified as a Title I school and received federal financial assistance to support student achievement. Second grade had a moderate size team with five classrooms and three teachers agreed to participate in the study. The second grade team did not have a high level of experience with teachers Laura and Nancy working eight and six years, while Suzanne was entering her first year. Class sizes ranged from smaller for Suzanne (20 students) and Nancy (21 students) to fairly larger for Laura (26 students). Students with IEPs fell into more common identification rates standing at 7% of the school population.

As a Title I school with a large ELL population, additional support was allocated to the grade level, including three full-time ELL teachers as well as assistance from the school reading specialists. This allocated staffing enabled coteaching and intervention support to work with groups of students for word study. Nancy described ELL support as follows:

> So our ELL kids are my lowest. ELL kids do their word study group with their ELL teacher and so she does the same format that I do, but then she goes back to it more times in a week as part of their reading group than I do, because she is introducing vocabulary, she’s introducing the like bigger concepts aside from introducing the words. (Nancy, teacher interview, October 25, 2016)
Utilizing ELL coteaching support, classrooms were able to provide more word study differentiation including in-depth vocabulary and background knowledge support. Although collaboration was present daily with staff in the general classroom, teachers did not collaborate across the grade level for word study staffing and instruction. Without team collaboration, providing a range of instructional levels was difficult for the team. Describing the challenges of meeting with multiple groups Laura explained:

> Umm lots of groups. Um I have them do activities, but with partners, because I can’t be with every kid. So it’s sometimes, I feel like they’re really catching on, other times they still have little idea what they’re doing. (Laura, teacher interview, October 28, 2016)

In addition, allocating limited amounts of time for word study can be difficult, which was described by Suzanne, “Having enough time to fit in word study. Even though it is only supposed to take 10 minutes, it is usually forgotten about and passed over” (Suzanne, winter survey, February 14, 2017). Suzanne demonstrated the difficulty of instructing a broad range of ability levels within her self-contained classroom.

**Results**

Prior to analyzing the participant data, the first step in the phenomenological analysis process was to describe my personal experience as the researcher. In the Epochen (see Appendix I), preconceived ideas about word study are addressed along with background information on educational and work experience relevant to the study. This served the purpose of “bracketing” out presuppositions and sharing experiences openly for the reader to make determinations of researcher objectivity. Furthermore, as the researcher, I was able to identify my potential bias, based on my successful elementary teaching experiences and work as a literacy facilitator. Through further examination, I was able to recognize the limitations of my experience and how
the research conducted in this study would include unique schools, teachers, and students that required unbiased observation and analysis.

The results of this phenomenological study were analyzed using of multiple data points to provide triangulation from different sources and formats. Data from semi-structured interviews, teacher journals, classroom observations, and analysis of student work were coded with the support of ATLAS.ti qualitative software. The ATLAS.ti software stored and organized 120 primary documents, including transcripts, journal responses, observation checklists, and student artifacts. Compared to manual data management, ATLAS.ti enabled more efficient and accurate coding. Codes were searched across documents quickly to identify connections and were counted for the purpose of enumeration. In addition, codes were effectively categorized into clusters of meaning leading to theme identification.

In terms of coding, certain codes were recorded as classifications of participant responses to specific research questions, while others were coded for frequency regardless of the participant. For example, when teachers described their level of professional development, responses for all participants were grouped into three categories, resulting in 19 total codes matching the total number of teacher participants (see Table 11). Other examples included Tables 3, 5, and 9, along with Figures 2, 3, 6, and 8. For other codes, such as teacher word study challenges, multiple codes were identified from a single teacher, which resulted in 6 categories and 76 total codes (see Table 4). Other examples of multiple codes per data point included Tables 6, 7, and 8, along with Figures 3 and 6.

During the second step of analysis, significant statements were highlighted across all data points associated with the research sub-questions. The significant statements included notable quotations, repeated terms (e.g. transfer or management), unique responses (e.g. personal
spelling experiences), numerical data (e.g. class size) and other points of interest (e.g. classroom dynamics). Data horizontalization was broad and weighed statements with equal value, withholding comparisons across data points, until later steps in the analysis.

In the third step of phenomenological analysis, clustering and thematizing, a review of significant statements identified the commonalities of experience. The highlighted statements were clustered into categories to infer meaning. For example, teacher responses to the question, “How effective do you feel word study is for your students?” were grouped as follows:

- Highly effective
- Somewhat effective
- Effective
- Not effective

To further illustrate, the following teacher statement was categorized as “somewhat effective” during analysis, “I feel it’s effective and they learn the patterns, but when sometimes, when they still go to write words, I have to remind of, remember how we did that in word study (Laura, teacher interview, October 28, 2016). Her response expressed how she valued word study, while also showing concern for spelling skill transfer to writing.

In the fourth data analysis step, these clusters of meaning were then reviewed and combined into invariant themes that defined the word study instructional experience for second grade teachers. Thematic analysis took place within the context of the research questions and the theme descriptions were divided accordingly. The final analysis sections combined these themes into textual descriptions (what), structural descriptions (how), and summarizing statements expressing the “essence” of the word study instructional experience.
In an effort to achieve data saturation and consistent triangulation, multiple data points were collected from all 19 participants. Incorporated into the data points are specific interview and survey questions that aligned with the research sub-questions. For example, the teacher interview data point addressed four out of the five research questions, through seven different interview questions. Table 2 outlines the specific interview and survey questions within each data point and the associated research question.
### Table 2

**Research Questions Alignment with Data Points**

<table>
<thead>
<tr>
<th>Research Questions</th>
<th>Teacher Interviews</th>
<th>Fall Journal</th>
<th>Observation</th>
<th>Winter Journal</th>
<th>Principal Interview</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the common word study instructional challenges faced by teachers?</td>
<td>How effective do you feel word study is for your students?</td>
<td></td>
<td></td>
<td>What challenges have you faced so far this year?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>What do you consider your greatest challenge teaching word study?</td>
<td></td>
<td></td>
<td>Are you satisfied with your current word study program?</td>
<td></td>
</tr>
<tr>
<td>What instructional methods for word study are successful for teachers?</td>
<td>What do you consider your biggest success teaching word study?</td>
<td></td>
<td></td>
<td>What progress has your class made toward your word study goals?</td>
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<tr>
<td></td>
<td>How do you apply the word study program with the individual students in your</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>classroom? For example, at-risk students, special education students, or English</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>language learners.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do teachers address their word study instructional challenges?</td>
<td>How new ideas, activities, and methods will you be incorporating this year for</td>
<td></td>
<td></td>
<td></td>
<td>Have you noticed any specific obstacles that have prevented or hindered implementation?</td>
</tr>
<tr>
<td></td>
<td>word study?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>In your opinion, what are the pros and cons to word study?</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>What are your thoughts on your</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What do different forms of administrator and student feedback suggest about</td>
<td>In your opinion, what are the pros and cons to word study?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>teachers’ word study instruction?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>What changes, either positive or negative, have you noticed in reading, spelling,</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>and/or writing performance in response to word study?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do teacher experience and professional development background influence word study instruction?</td>
<td>What was your experience learning spelling as a child?</td>
<td>What resources do you have to teach word study? What resources do you still need to teach word study?</td>
<td>Have you noticed any specific obstacles that have prevented or hindered implementation? What is your role in the implementation of word study in your school?</td>
<td></td>
<td></td>
</tr>
<tr>
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<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>lesson/activity today? How do you feel the students benefited today from your lesson?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Research Question One

The first research question, “What are the common word study instructional challenges faced by teachers?” aimed to identify the obstacles that second grade teachers faced utilizing word study in their specific classroom contexts. This research question was explored primarily through the teacher interview at the start of the school year and then concluded with the winter journal response. In the teacher interview, the questions focused on the cumulative experiences of the teacher and their knowledge of past challenges. The winter journal was more specific, asking the teacher to describe recent challenges with a class of students at the midpoint of the school year.

As outlined in Table 2, for the teacher interview (see Appendix A), two questions were aligned with research question one. Question four, “How effective do you feel word study is for your students?” explored the overall effectiveness of word study from the teacher’s perspective at the start of the school year. The full sample of 19 teacher responses were then grouped into four categories, as outlined in Table 3. The predominant response to this question was that word study was “somewhat effective” for students (63%). Such responses recognized benefits to the developmental approach, but also noticed flaws, especially regarding an inability for some students to transfer the skills to writing. Participant descriptions by Laura and Brianna (Table 3) illustrated the challenging writing component, beyond application during spelling activities and tests. The category of “highly effective” was the second most frequent (21%), demonstrated by the enthusiasm of teachers, such as how word study, “. . . is the best way for kids to learn” (Melissa, teacher interview, September 9, 2016) and cross-curricular connections mirror, “how we teach reading too” (Rachel, teacher interview, September 9, 2016). The final two groupings were “word study effective” (11%) and “word study not effective” (5%), which were
considerably smaller. Combining categories, the “effective” to “highly-effective” group was 32%, which was less than half than the “somewhat” to “not effective” groups (68%). These responses demonstrated the overall difficulties teachers recognized with word study entering the school year, although it is notable that a combined 95% of teachers had some level of success.

Table 3

**Teacher Interviews – Word Study Effectiveness**

<table>
<thead>
<tr>
<th>Open Codes</th>
<th>Frequency</th>
<th>Percentage</th>
<th>Examples of Basic Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word study somewhat effective</td>
<td>12</td>
<td>63%</td>
<td>“I feel it’s effective and they learn the patterns, but when sometimes, when they still go to write words, I have to remind them of remember how we did that in word study.” (Laura, October 28, 2016).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“I think it’s definitely necessary. I think it’s effective. I’m definitely would be interested in it being more effective. Um especially for the writing component and spelling when they write . . .” (Brianna, September 30, 2016).</td>
</tr>
<tr>
<td>Word study highly effective</td>
<td>4</td>
<td>21%</td>
<td>“It is very thorough and kids learn by association and I think that is the best way for kids to learn” (Melissa, September 9, 2016).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“because that is how we teach reading too. We chunk up the words into different chunks and we stress the vowel sounds . . .” (Rachel, October 5, 2016).</td>
</tr>
<tr>
<td>Word study effective</td>
<td>2</td>
<td>11%</td>
<td>“This would be, this part year, was my biggest success in teaching word study, because we divide the students up. I actually am able to teach word study the way it’s meant to be taught.” (Erika, September 2, 2016).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“I think for some it’s very effective and then for some such as my ELL it helps them a little bit…” (Tiffany, September 19, 2016).</td>
</tr>
<tr>
<td>Word study not effective</td>
<td>1</td>
<td>5%</td>
<td>“I think it’s a piece of the puzzle. I don’t really put a lot of stock in this is how their gonna learn how to spell.” (Lucy, October 5, 2016).</td>
</tr>
<tr>
<td>Total</td>
<td>19</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

Past difficulties teachers experienced were explored in more detail during the teacher interview with the question, “What do you consider your greatest challenge teaching word study?” (see Appendix A). In this open response format, multiple answers were given to describe teacher challenges, which are listed in Table 4. With a sample of only 19 teachers, the 76 responses demonstrated how teachers often had more than one challenge. The leading
obstacle was a need for professional development (26% of responses) as teachers requested further training, coursework, support, and technical assistance. Teacher requests in this regard sought improving their understanding, especially in terms of comprehending the program and utilizing the data. For example, Taylor described confusion regarding the terms, “Understanding what all those words mean, Syllable Juncture, Letter Name, and Within Word. It’s like, it’s French, I don’t know what that means” (Taylor, teacher interview, October 11, 2016). In addition, Marie had difficulty interpreting diagnostic results, “I know when we grade the DSAs I have to ask someone what order they should be in” (Marie, teacher interview, September 17, 2016). These professional development requests demonstrated teachers’ understanding of the program and its benefits, as well as an awareness of limited understanding of certain patterns or features.

The next highest challenge was a “need for time” (24% of responses) in which teachers had difficulty integrating word study consistency into their comprehensive elementary curriculum. Time was a challenge for teachers to implement word study due to multiple variables. One aspect was the struggle meeting student needs, whether referring to teaching multiple groups or an overall large class size. In Tracy’s response, she struggled with the “time management of the groups” (Tracy, teacher interview, September 12, 2016) in terms of allotting the appropriate amount of instructional time and continuous support for the three of groups in her classroom. Rachel similarly struggled meeting multiple needs, but focused on individual students, stating “. . . it’s hard to get around to 23 kids and check their work to make sure they’re doing it” (Rachel, teacher interview, October 5, 2016). In such situations, the concern was meeting personal expectations and teaching word study with fidelity in classrooms with unique student needs. Another concern was the limited amount of time for word study, when multiple
subjects were required to be taught. Nancy echoed this sentiment as she reflected on her classroom schedule:

Always time... If I could give it more time, it would be more effective. For the time that I can give it, it’s somewhat effective. Um, I’m supposed to give it a bucket of time every day that in practice is unreal, what it has historically been for me. (Nancy, teacher interview, October 25, 2016)

Multiple teachers described interest in implementing word study with fidelity, but felt they were unable due to other curriculum requirements in language arts (e.g. reading and writing), intervention programs, and other content area subjects (e.g. social studies and science).

The third highest challenge (10% of responses) teachers noted was a lack of transfer of spelling skills. The concept of transfer refers to a student’s ability to internalize new word study learning and apply the concepts during authentic reading and writing experiences. This concern for transfer was explained by Steve as follows, “I have not really seen that it impacts their written work as much as I would hope. And I think if we’re doing it, it really should be making a difference” (Steve, teacher interview, October 11, 2016). In this regard, word study is not an end unto itself, rather a sub-skill that teachers intended to be applied in other areas of literacy (e.g. reading and writing). This application was sought by Rachel in discrete sentence writing, “I’m very surprised on how many cannot carry that word over to sentences, to use in a sentence. So that’s an eye opener for me” (Rachel, teacher interview, October 5, 2016). Other teachers looked for general applicability, including Tiffany, as she sought students, “use it to help them spell words they’re not familiar with” (Tiffany, teacher interview, September 19, 2016) and Brianna’s goal for students was “applying the rules in their everyday writing” (Brianna, teacher interview, September 30, 2016).
The remaining three categories of challenges all fell below 10% of total responses, which included needs in group management/organization (9%), remediation/intervention (9%), and extension/advanced activities (7%). Management described how teachers faced challenges setting up their homogenously-skilled groups and as described by Suzanne, “making sure students are on the appropriate levels. And you know, still kind of tweaking where they are” (Suzanne, teacher interview, October 19, 2016). Teachers were uncertain at times how to balance meeting the individual needs of students, while maintaining a reasonable number of groups with appropriate sizes. Remediation/intervention and extension/advanced activities are somewhat opposite sides of the similar issue of differentiation. Teachers hoped for more intensive word study practice to find great benefit, because they, “don’t necessarily meet with spelling groups every day” (Matt, teacher interview, September 12, 2016) and worried about a lack of student responsiveness to instruction, as highlighted by Laura, “Students who are on vowel sounds the entire year, that never seem to get it” (Laura, teacher interview, October 28, 2016). The stagnation of spelling development for certain students was an area of focus for Laura, warranting an altered approach in some form. The needs of high-performing spellers was a different concern, stated by Betty, “Instructing those higher level kids that we feel like can spell just because they can spell. They are just really good spellers” (Betty, teacher interview, September 13, 2016). It was not simply that teachers did not have methods and resources for these students, but recognition that these young spellers may not be developmentally prepared. The difference between accurate spelling and word knowledge was expressed by Erika:

My greatest challenge in second grade is when students are in word study um patterns, syllable and junctures and higher, because they really don’t know the words that they are
trying to spell and so um it becomes an issue of teaching the meaning of the words.

(Erika, teacher interview, September 2, 2016)

Above-level instruction was a complex issue for many teachers and the ideal approach was uncertain.

Table 4

Teacher Interviews – Greatest Challenge

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need for professional development</td>
<td>20</td>
<td>26%</td>
</tr>
<tr>
<td>Need for time</td>
<td>18</td>
<td>24%</td>
</tr>
<tr>
<td>Lack of transfer of spelling skills</td>
<td>10</td>
<td>13%</td>
</tr>
<tr>
<td>Need for group management/organization</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>Need for remediation/intervention</td>
<td>7</td>
<td>9%</td>
</tr>
<tr>
<td>Need for extension/advanced activities</td>
<td>5</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>76</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Research question one was revisited at the end of the study, as teachers responded to winter journal questions. The journal provided enhanced triangulation in the study, allowing teachers to independently respond to questions online on their own time, rather than immediate responses in face-to-face interview settings. Furthermore, the winter journal gained insight to how teachers felt in the middle of a current school year, after working with their students for multiple months. Within the winter journal (see Appendix B), the question, “Are you satisfied with your current word study program?” explored teacher opinions while teaching. Responses were grouped into the same four potential categories as Table 3, but 0 out of the 19 responses could be labeled as “word study not effective.” Overall, teacher responses in Table 5 were more positive than Table 3. These differences are evident when comparing categories:

- Effective – 11% increased to 47%
- Somewhat effective – 63% decreased to 32%
• Highly effective – 21% remained the same
• Not effective – 5% decreased to 0%

Reviewing comments listed in Table 5, positive characteristics focused on meeting students at their developmental levels and matching appropriate instruction to help them progress. Highly positive responses tended to identify the broader benefits of word study, such as identifying the whole picture of the child and connections to alphabetization, dictionary knowledge, vocabulary, and handwriting. In contrast, negative aspects continued to be focused on limited time for word study and the lack of transfer of word knowledge to other subjects.

Table 5

**Teacher Winter Journal Response – Word Study Effectiveness**

<table>
<thead>
<tr>
<th>Open Codes</th>
<th>Frequency</th>
<th>Percentage</th>
<th>Examples of Basic Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word study effective</td>
<td>9</td>
<td>47%</td>
<td>“I am able to reach each student where they are, help them progress, and take them to where they need to be.” (Kate, February 6, 2017).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Yes, we take the time to test and place students where they can get instruction specifically based on their needs. Two weeks per sort gives us time to discuss, practice, and check before testing.” (Rita, February 12, 2017).</td>
</tr>
<tr>
<td>Word study somewhat effective</td>
<td>6</td>
<td>32%</td>
<td>“Yes, I like how we have a structure to follow in regards to assessing them and giving them words that fit their level. No, I would like to have more time dedicated towards Word Study.” (Matt, February 6, 2017).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Yes and no—it seems very isolated and would like it to be tied in more to other areas.” (Lucy, February 17, 2017).</td>
</tr>
<tr>
<td>Word study highly effective</td>
<td>4</td>
<td>21%</td>
<td>“We deal with all aspects of the spelling curriculum. It gives you a whole picture of the student and their strengths and weaknesses.” (Tracy, February 15, 2017).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“I feel our word study approach covers word patterns and features, vocabulary development, dictionary work, cursive practice, previous weeks' lists (with random sort activity) and alphabetizing.” (Tina, February 11, 2017).</td>
</tr>
</tbody>
</table>

The second winter journal question asked teachers to reflect and was stated as follows, “What challenges have you faced so far this year?” (see Appendix B). In addition to providing
triangulation with the interview, this question more specifically addressed the current classroom experience, instead of past teaching experiences as a whole. Furthermore, this response was a more recent memory with teachers working in the moment, compared to experiences from years past.

When comparing Table 4 with Table 6, or in other words, past challenges versus current challenges, certain aspects remained consistent, while others changed. Perhaps most notably, the need for professional development changed from 26% of total responses to not mentioned altogether. At this mid-year point, teachers did not appear interested in additional training or resources, rather their attention faced toward current classroom issues. Another key change was a new category, “need for volunteers,” which represented 17% of responses. In this category, teachers wished for “help from parents” (Rachel, winter journal, February 6, 2017) and wanted frequent support such as being able to “have someone come three times a week” (Melissa, winter journal, February 2017). For the remaining categories, the similarities and differences were evident when comparing fall and winter responses:

- Need for time – 24% increased to 31%
- Lack of transfer of spelling skills – 13% increased to 17%
- Need for group management/organization – 9% increased to 10%
- Need for remediation/intervention – 9% increased to 14%
- Need for extension/advanced activities – 7% decreased to 3%

Further emphasis was placed on time in the winter survey with the percentage of responses (31%) counting almost double compared to all other categories. Some responses lamented for more time to further accelerate the benefits of word study, such as Matt’s description of his main challenge:
Time, I do believe that if there was more time to spend on Word Study, even 10 minutes a day the students would be able to grow so much more and have more time to apply the skills they are learning. (Matt, winter journal, February 6, 2017)

In addition, teachers recognized multiple obstacles inhibiting their ability to implement the program, including required assessments such as the Phonological Awareness Literacy Screening (PALS), Developmental Reading Assessment (DRA), and English Language Learner (ELL) Access testing.

Another increased concern was the lack of transfer of learned skills (17%), as teachers noted their students were not consistently utilizing learned spelling concepts. This included multiple literacy areas, such as, “applying the skills automatically in their spelling and reading” (Tracy, winter survey, February 15, 2017) and “getting the students to apply what they learned with their sorts in their everyday writing” (Donna, winter survey, February 8, 2017).

In terms of differentiation, a need for remediation (14%) was far more frequently mention than a need for enrichment (3%). Participants explained that these low performing students often had a combination of deficiencies, yet Brianna explained these students “need to make the most progress with spelling word study words” (Brianna, winter survey, February 15, 2017) and Marie explained she wanted to provide further support, “the extra time with my students would be beneficial” (Marie, winter survey, February 16, 2017). The overall sentiment concerning remediation recognized that students struggling with literacy needed intensive reading remediation, but word study instruction should be maintained or even expanded. Analyzing group management and organization responses (10%), familiar obstacles were mentioned, such as large class sizes, multiple groups, and a wide range of spelling needs.
Reviewing teacher interviews and winter surveys, teachers began and ended with a predominantly positive view of word study. Despite concerns, they valued aspects of the program, even if their classes did not have universal student success. Specific challenges remained mostly the same with concerns about time, skill transfer, program management, and differentiation. The only major change was a shifted perspective on professional development, which teachers were not seeking at the mid-point of the school year.

**Research Question Two**

The second research question, “What do you consider your biggest success teaching word study?” aimed to identify the useful methods and effective approaches of second grade teachers. This research question was investigated through three data points at different points in time. The initial teacher interview took place at the very beginning of the school year, followed by a mid-year fall journal, and concluded with the winter journal response. Data were triangulated though the different formats, which included face-to-face interviews, followed by private journal entries.

As outlined in Table 1, the interview question, “What do you consider your biggest success teaching word study?” (see Appendix A) addressed the second research question. This interview question sought a cumulative understating of the word study experience, as teachers

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Table 6

*Teacher Winter Journal Response – Challenges*

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need for time</td>
<td>9</td>
<td>31%</td>
</tr>
<tr>
<td>Lack of transfer of spelling skills</td>
<td>5</td>
<td>17%</td>
</tr>
<tr>
<td>Need for volunteers</td>
<td>5</td>
<td>17%</td>
</tr>
<tr>
<td>Need for remediation/intervention support</td>
<td>4</td>
<td>14%</td>
</tr>
<tr>
<td>Need for group management/organization</td>
<td>3</td>
<td>10%</td>
</tr>
<tr>
<td>Lack of home support</td>
<td>2</td>
<td>7%</td>
</tr>
<tr>
<td>Need for advanced/extension support</td>
<td>1</td>
<td>3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>29</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
reflected on positive outcomes from past instruction. A total of 28 codes were identified during interviews, as some teachers mentioned more than one success. A range of outcomes were explained across the eight identified successful methods.

The most prevalent behavior was a “transfer of skills” that was 29% of the total number of responses. This area of success was interestingly also a common challenge in many interviews (17% of responses). Regardless of opinion, the frequency of this issue demonstrated it was an important concern for teachers, whether positive or negative. As described by Brianna, the consistency was important, “I like to see when the kids are able to apply the spelling rules in their everyday writing” (Brianna, teacher interview, September 30, 2016). Matt felt rewarded by the long-term writing development, “I would say seeing their growth from the very beginning of the year to the end of the year. Umm, how much they improve with their writing. Um, based on word study. Helps out dramatically” (Matt, teacher interview, September 12, 2016). Instead of monitoring word study assessment scores, the usage of these spelling and vocabulary skills were important. Another informative note was the comprehensive view of success described by Tina:

I don’t know if this across the county, but we added a vocabulary component to it, which was sort of the missing piece for us and I think that’s been very helpful in building the kids vocabulary so we are seeing that transfer over to their writing. (Tina, teacher interview, September 15, 2016)

In Tina’s description, she attributed specific instructional practices implemented by the second grade team that led to the transfer of skills to writing.

The second most frequent response was “identifying patterns” which referred to students identifying specific common word features within words to help them with spelling. Rather than the memorization of spelling words and short-term understanding, these responses valued in-
depth comprehension. In weekly routines and test format, Rita expressed her view of success in application, “When they understand the vowel patterns, they know where to put them, and when I give them bonus words they can successfully place them and spell them” (Rita, teacher interview, September 27, 2016). In Rita’s response, rather than traditional recall of a word list, she observed growth beyond spelling as grouping words by pattern and applying those patterns to spell. Another success was recognizing that breakthrough learning moment for a student, I like when you can see that it clicked with a student. When they’re like, “I know my vowels now” and they write in their notebook using all the words they possibly can with those vowels to like show they have the pattern down. (Laura, teacher interview, October 28, 2016)

Rita highlighted the enthusiasm and positive growth associated with the deeper understanding of a vocabulary pattern. Her view should be recognized within the context of a Title I school with many English language learners, because students were potentially building confidence in their understanding of English. Another view of word study success was explained by Nancy as she demonstrated a long-term mindset:

The idea that we can sort and figure out the roots. That we can look at words and understand that there are patterns to them. That’s a win for me even if they don’t learn all of the patterns, if they just understand it at the second grade level that words have patterns and if we as a system are gonna continue to expose them to word study then I win, because we got the foundation. (Nancy, teacher interview, October 25, 2016)

For Nancy’s students, who are predominantly ELLs and low-income, their developing foundation of word knowledge and growth over the year she appreciated. Nancy was not only considering their success for the current year, but scaffolding their success in future grades.
The third most common response was “differentiation” during teacher interviews. In this category, teachers valued the ability to use word study to coordinate instruction at different levels in their classroom. Taylor explained the ability to instruct multiple levels:

I think when we differentiated the groups and really honing in on what children needed and teaching them at their level. I think that was a success. So if they needed short vowels, they got short vowel. I had a high group, I was teaching a little bit accelerated um so that they weren’t getting the same thing over that they knew. So I think that was a benefit to differentiate and to meet them where they are. (Taylor, teacher interview, October 11, 2016)

Taylor’s success was differentiating instruction to meet all of her students’ needs, by challenging more advanced students while supporting typically below-level students with appropriate instruction. This differentiation was beneficial for student growth, compared to a single word list for all students, in which many students would not be supported appropriately. This process was also reinforced by Suzanne, “I think that is one of the great aspects of word study is that you are meeting them on their level and not just giving one generic test for everybody” (Taylor, teacher interview, October 19, 2016).

The fourth most common area for success was “student ownership” (11% of responses), which referred to students taking control of their learning and understanding their use of language. Aspects of this code aligned with others, as students recognized patterns and transferred their spelling knowledge to different contexts. It also included student effort and goal setting, as described by Melissa, “I love having them be able to see that your hard work they put in paid off and you set a goal and you achieved it” (Melissa, teacher interview, September 9,
2016). For Melissa, word study provided developmentally appropriate word sorts and instructional scaffolding enabling students to achieve success in her classroom.

The remaining successes were infrequent, all falling below 10% of the total number of responses (Table 7). The “vocabulary development” code (7% of responses) described teacher appreciation of overall growth of student word meaning knowledge. The code “spelling growth” (7% of responses) described a basic recognition of improved spelling grades, evident through increasing assessment scores. Single responses (3.5%) were also recorded for “vertical alignment” describing a consistency of the word study curriculum across grade levels, and “parent communication” referring to improved family understanding of the word study program.

Table 7

*Teacher Interviews – Successful Methods*

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer of skills</td>
<td>8</td>
<td>29%</td>
</tr>
<tr>
<td>Identifying patterns</td>
<td>6</td>
<td>21%</td>
</tr>
<tr>
<td>Differentiation</td>
<td>5</td>
<td>18%</td>
</tr>
<tr>
<td>Student ownership</td>
<td>3</td>
<td>11%</td>
</tr>
<tr>
<td>Vocabulary development</td>
<td>2</td>
<td>7%</td>
</tr>
<tr>
<td>Spelling growth</td>
<td>2</td>
<td>7%</td>
</tr>
<tr>
<td>Vertical alignment</td>
<td>1</td>
<td>3.5%</td>
</tr>
<tr>
<td>Parent communication</td>
<td>1</td>
<td>3.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>28</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

The concept of word study success was addressed by the combination of goal setting questions in the fall journal and winter journal. The fall journal, completed by teachers during the first marking period, had teachers establish their word study goals for the year, “What goals do you have for your word study program this year?” (see Appendix B). Responding to this question, teachers stated a range of goals, which could be grouped as either student-focused or teacher-focused. Figure 2 displays these responses, which shows student goals (79%) far surpassing personal teacher goals (21%).
The specific goals that teachers set for themselves and/or their students had a few common themes. Eleven teachers sought for students to compare and contrast common sounds and patterns to decode and spell words. This objective to use word knowledge was expressed by Melissa, “My goal is for all students to advance in their understanding of word patterns to help them read as well as write words” (Melissa, fall journal, February 2017). The application of patterns was described even further by Kate, “Students will learn and apply focus patterns in their reading, writing, and spelling. Students reading below grade level will attain grade level by end of year and/or make more than one year's growth in reading” (Kate, fall journal, February 6, 2017). Kate’s interest incorporated the broader language arts curriculum (e.g. spelling, reading and writing), while also valuing word study to aid in the overall reading level development of her students. The transfer of word study concepts to student writing skills was a goal for nine
teachers, as illustrated by Tina, “The students will apply their knowledge of word features and patterns into their daily writing” (Tina, fall journal, February 11, 2017). Brianna expressed further application, “I want my students to learn, to learn the spelling patterns and words on the list. I also want for them to carry over the words to their everyday writing and also to apply the word rules to new words in their writing” (Brianna, fall journal, February 15, 2017). Brianna aimed for students to not only directly apply words from word study lists, but also further transition the skills to spell new words with accuracy. Overall, student goals focused on mastery of word study skills and their application into other areas of literacy development.

In terms of teachers setting personal goals (21% of responses), the main focus was on coordination of activities and assessments. Marie explained her interest in an ongoing assessment schedule, “I hope to master a rotation in which I check in my students' work and use my observations as formative assessments” (Marie, fall journal, February 16, 2017). The goal for Rachel concentrated on long-term summative assessment, “I would like to have a test based on the past spelling words every nine weeks” (Rachel, fall journal, February 6, 2017). Nancy was more interested quality classwork activities, “To do more hands on activities with it during the week instead of just introducing it and then testing on it later” (Nancy, fall journal, February 9, 2017). Nancy recognized the past limitations of her program, relying on a weekly lesson and homework in comparison to regular classwork practice. Taylor, a less experienced word study instructor, sought a more general goal, “To become more knowledgeable in teaching the word study program” (Taylor, fall journal, February 13, 2017). The goals for teachers as a whole were self-reflective, exploring their past practices and to determine their needs moving forward.

The winter journal was the final data point connected to research question two. The winter journal question, “What progress has your class made toward your word study goals?”
sought to describe the specific success at the midpoint of the school year. Observing the full 19 teacher sample, 84% of teachers gave responses that categorized as good progress. This positive view of word study progress was further reinforced by only 16% of teachers describing “some student progress” and no teachers stating “no progress” or “negative impact.” At this point in the year, all teachers in the study had observed some benefits to their program and no one had an overly disappointed or negative view.

Figure 3

* Winter Journal – Student Progress

* Note: No participants described a complete lack of student progress

Closely analysing the responses, 21 codes were identified from the sample from the 19-teacher sample. Two teachers described two areas of class progress in their response (Nancy and Tracy). The leading category of progress was “transfer of skills” with 33% of responses, which mirrored the leading category of the initial teacher survey (29% of responses). The level of
transfer varied as some teachers noted more progress. Lucy described moderate writing progress for her class, “I think the class is progressing with their spelling skills and applying those skills more in their everyday writing” (Lucy, winter survey, February 17, 2017). Tina’s response in comparison noted further growth, “I am seeing steady strides in the carryover into daily writing of word study patterns and features” (Tina, winter survey, February 11, 2017). Tracy’s description of progress response was more varied, “My class has done really well this year with their word study. They are more aware of their skills and are applying it a bit more in their writings” (Tracy, winter survey, February 15, 2017).

The next highest area of class progress was “differentiation” (29% of responses) in terms of coordinated instruction to meet student needs. The process of successful differentiation was described at-length by Erika:

My class has made significant progress towards my word study goals. I have been able to utilize the DSA to place students in the appropriate pattern which has informed my instruction. Students have been assessed and changed groups every six weeks to meet their individual needs. (Erika, winter journal, February 12, 2017)

Interestingly, although “spelling growth” described the most basic outcome of word study, the category only reported at 14% of total responses. Considering word study is commonly associated with traditional spelling programs, it is interesting the sample of teachers recognized other outcomes more frequently. Perhaps addressing the question most literally, teachers responded about weekly and longer-term checkpoints (e.g. marking period, semesterly, yearly). Rachel described the weekly routines of her students as a success, “My students have been doing well with learning their words and sorts each week” (Rachel, winter journal, February 8, 2017). For Matt’s perspective, he viewed growth based mostly on group performance, “My students so
far this year have made steady progress. They just took my mid-year assessment and two of my students moved up a word study group where most of them stayed the same” (Matt, winter journal, February 6, 2017).

Another category accounting for 14% of responses was “student ownership.” Teachers explained how students had become responsible for their spelling development at the midpoint of the school year. In Tiffany’s response, she recognized the accuracy and efficiency of her students, “We continue to work on daily activities and they are getting more accomplished at completing these various activities quickly and thoroughly. I see many improving and they are very proud of their hard work!” Tiffany not only valued students taking responsibility for their work, but also the confidence they built through increased student ownership. The final two areas of progress accounted for only 5% of responses and described development in terms of “reading growth” and “writing growth.” These responses recognized the connections between improvement in word study and other areas of literacy.

Table 8

Winter Journal – Areas of Class Progress

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer of skills</td>
<td>7</td>
<td>33%</td>
</tr>
<tr>
<td>Differentiation</td>
<td>6</td>
<td>29%</td>
</tr>
<tr>
<td>Spelling growth</td>
<td>3</td>
<td>14%</td>
</tr>
<tr>
<td>Student ownership</td>
<td>3</td>
<td>14%</td>
</tr>
<tr>
<td>Reading growth</td>
<td>1</td>
<td>5%</td>
</tr>
<tr>
<td>Writing growth</td>
<td>1</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>21</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Analyzing areas of results regarding beginning of the year interviews (areas of success) and mid-year winter journals (areas of class progress), similarities and differences were evident:

- Transfer of skills – 29% increased to 33%
- Identifying patterns – 21% decreased to 0%
Differentiation – 18% increased to 29%

Student ownership – 11% increased to 14%

Vocabulary development – 7% decreased to 0%

Spelling growth – 7% increased to 14%

Vertical alignment – 3.5% decreased to 0%

Parent communication – 3.5% decreased to 0%

Reading growth – new response (5%)

Writing growth – new response (5%)

Evaluating the responses, the areas that teachers highlighted most frequently reflected deeper understanding of concepts (transfer and ownership), along with student-centered instruction (differentiation). General spelling growth and basic pattern identification were of less interest to teachers, compared to higher-level instructional methods and individualized student growth. Although a key component, vocabulary development was not consistently connected to the word study program at the second grade level. A focus on spelling development may be of higher importance in upper grades (3-5 or middle school), where expanding vocabulary and higher-level reading skills are more common. Teacher interview responses for vertical alignment and parent communication were more closely aligned with teacher and parent needs, which potentially led to their lack of representation during the student goal question for the winter journal.

In response to research question two, teachers overall had a broad level of appreciation for the program with 84% of teacher describing good progress. Analyzed historically and during a given year, teachers mostly valued the ability for the program to enable transfer of skills,
instructional differentiation, and student ownership, along with some recognition for pattern application and general spelling improvement.

**Research Question Three**

The third research question, “How do teachers address their word study instructional challenges?” intended to identify the methods that teachers utilized to overcome challenges, such as the obstacles described in research question two. This question was approaches through three different data points: teacher interviews, fall journals, and winter journals. The teacher interview reflected on student obstacles in the past, while the journal entries concentrated on new methods approached in the current year.

For the teacher interview, the question, “How do you apply the word study program with the individual students in your classroom? For example, at-risk students, special education students, or English language learners” (see Appendix A) sought to address research question three. This question explored how teachers utilized word study to support the range of instructional levels in their classrooms as well as specialized student needs (e.g. at-risk, SPED, ELL).

For at-risk or low-performing students, 5 out of 19 teachers provided clear responses. A few common themes were presented across this group of teachers. One method described by Melissa and Laura involved meeting with students more frequently and providing additional time for practice that other students. For Melissa, her at-risk students missed word study time due to other reading interventions, requiring specialized accommodations:

Well those kids, those at-risk kids are primarily the ones that are getting power up, so then what I have to do is do word study with them at another time, so some of them I do, they come in first thing in the morning and I’ll start there, where they sit back here and
sort their words and eat their breakfast and they’ll write them in their journal, the same activities the other children are doing. (Melissa, teacher interview, February 2017)

In the case of Laura, her at-risk students warranted additional guided support, so she altered her schedule accordingly, “Well they’re all different levels, so everyone has a different, grouping of sorts. And the kids, my lowest group I meet with them every day and then the other kids have activities where they are working with a partner” (Laura, teacher interview, February 12, 2017).

In Laura’s classroom, she prioritized her at-risk students and provided equitable support to meet their specific needs.

Another approach described by Taylor and Erika was the movement of students between different leveled groups in response to performance. As described by Taylor, the entire grade level had a scheduled plan to adapt support:

So we differentiate, so we take that test, that diagnostic that you referred to and we look at the data and then the children are split and then every quarter we revisit and look at the data again and then move the children according to where they need to be. (Taylor, teacher interview, February 13, 2017)

The ability to differentiate instruction through the word study program provided opportunities for teachers to meet their at-risk students’ needs through group size and meeting frequency.

Teaching students with individualized education plans (IEPs) requiring special education support was also emphasized by six teachers. One type of approach, described by three teachers, was the opportunity to reach small groups or individuals with specialized instruction using word study. In Tracy’s class, she divides her class into smaller groups, “I have the inclusion classroom and so I do have support classroom coming into the classroom. We divide the groups up. We normally have two-to-three teachers in here and we divide the class up in small groups
and do that for special ed” (Tracy, teacher interview, February 15, 2017). Tracy utilized the additional special education teachers in her room to work with multiple small groups. For Kate’s classroom, she further differentiated instruction at the student level, “So I’ve had SPED, so it works well with them. So umm just working more individually, kinda more one-on-one with those students versus small groups” (Kate, teacher interview, February 6, 2017). The ability to implement an approach such as Kate’s is unique, requiring a high-level of experience to coordinate individualized instruction in a large elementary classroom.

Another approach, described by two teachers at Newport elementary, relied on shortening the list of words for students with special needs. Brianna explained her methods as follows:

Right, so I have special ed students, which is usually what it is. Umm, if the list needs to be modified I modify the list, shorten the list, I tell them which words will be on the test on Friday, which 10 words, um but the assessment at the beginning of the year tells me where I need to start them at least. (Brianna, teacher interview, February 15, 2017)

Brianna decreased the challenge of the word study with fewer words and specifying the specific words that would be assessed. Lucy similarly taught fewer words, “If everyone else is given 12 words, then they are given 6. You know it’s not, I don’t want to make it torturous for them” (Lucy, teacher interview, February 17, 2017). This approach to differentiation support was less common compared to other classrooms, since it does not address the specific word knowledge needs of students, rather just reduces the memorization requirements.

Another special population needing support are English language learners (ELLs), who are learning the language as they are building their word knowledge. The needs of this population was of great important to Thomas Elementary and Harris Elementary, because they had very high ELL populations in low-income communities (Title I). ELL needs remained an
important issue in certain classrooms at the four other schools, because ELL students were commonly purposely grouped in certain classes to provide the appropriate support. As a whole, 10 teachers mentioned applying word study with ELL students in their classrooms.

One method of aiding unique ELL needs was providing picture supports associated with word lists. This process was described by Kate, “We do picture support, so they have, when I teach the word I show them a picture, they also have pictures they glue into their word study journals. So I give support that way” (Kate, teacher interview, February 6, 2017). The specific use of the pictures was further described by Tina, “I try to provide a lot of visuals. So along with the vocabulary is all visual, umm so they have definitions but along with that is a picture for every word” (Tina, teacher interview, February 11, 2017). These accommodations enabled students to have greater access to the words and be less reliant on the teacher for ongoing support.

Similar to special education support, ELL was also addressed through small group instruction and additional teachers. Often these approaches are paired in which small groups of students are supported separately by ELL teachers. Small group support with an ELL teacher was described by Nancy:

So our ELL kids are my lowest ELL kids do their word study group with their ELL teacher and so she does the same format that I do, but then she goes back to it more times in a week as part of their reading group than I do, because she is introducing vocabulary, she’s introducing the like bigger concepts aside form introducing the words. (Nancy, teacher interview, February 9, 2017)
This combined approach demonstrated how word study instruction could be implemented with fidelity for ELL students, while integrating the needed background knowledge and language support. Tiffany approached ELL small group support somewhat differently:

I have ELL, and they are doing spelling with me this year just because they scored high enough that their not in individual separate ELL spelling group, but we are going to keep an eye on them, because we just have had one test so far and I think it’s gonna be little difficult. We’ll so how well they do. (Tiffany, teacher interview, February 7, 2017)

Tiffany did not separate her ELL students, rather established her groups directly based on diagnostic assessment regardless of ELL classification. Recognizing potential difficulties due to language or background knowledge needs, she intended to give further support as necessary.

In the fall journal entry, teachers were asked about plans to adapt their program with the following question, “What new ideas, activities, and methods will you be incorporating this year for word study?” (see Appendix B). In this journal entry, the 19 teachers gave a range of responses, grouped into five categories. These categorizes are displayed in Figure 4. It should be noted, one teacher (Lucy) stated she did not have any plans for new word study activities.
In the category of “choice and variety,” the teachers mentioned different activities they selected to expand options in their classroom. As described by Tiffany, “I like to have different activities for them to work on in their Word Study Notebook, so I'm always looking for something new for them to do” (Tiffany, fall journal, February 7, 2017). Across other interviews, choices that were described included:

- Timed sorts
- Blind sorts
- Speed sorts
- Vocabulary sheets
- Pattern poems
• Test a buddy

• Choice boards

Another category, represented by four responses, focused on meaningful and application-based activities. Engaging activities were the emphasis for Betty, “Some new activities for them to work on each day- focusing on highlighting patterns and not just busy/fun work with their words!” (Betty, fall journal, October 24, 2016). Betty recognized the importance of the specific word study activities students engage in as a class, emphasizing meaningful patterns rather than word memorization. Furthermore, Tracy sought analyzing meaningful application of word patterns in authentic writing as support, “Since applying their word study strategies is one of my main goals, I am really looking at their writing with a critical eye, based on their word study words (Tracy, fall journal, November 2, 2016).

Another new focus teachers described was the curriculum integration and classwork practice using word study. This included connecting word study to the broader literacy instructional approach of the teacher, aligning with other components such as reading and writing. For example, Brianna stated, “I am using word study during Daily 5” (Brianna, fall journal, November 15, 2016). Also, Suzanne described, “Center activities with word study activities added to my rotation” (Suzanne, fall journal, November 17, 2016). For Brianna and Suzanne, they incorporated word study into their current structure to provide students with opportunities for continuous practices on a weekly basis. Another change outlined by Steve described a team approach at Thomas Elementary, “We are doing a sort every 2 weeks (instead of weekly) this year so I have added some new, more challenging practice activities” (Steve, fall journal, November 29, 2016). The second grade team made overall scheduling changes, which allowed two weeks for each word list in order to increase the amount of time for practice.
The final categories of “enrichment” and “remediation” were each described by two teachers as areas for support in the school year. Regarding enrichment, or advanced activities, teachers from Eagle Hill were applying new methods. Erika described her word study goals as follows, “I am searching for the best method to incorporate those students who are above grade level expectations so that I can enrich the students learning experiences” (Erika, fall journal, October 24, 2016). Melissa had made enrichment plans for the year, “For our highest spellers, we are doing word ladders to enrich vocabulary development” (Melissa, fall journal, October 24, 2016). At Eagle Hill Elementary, a need had been identified for upper-level support in second grade, integrating more meaning-based vocabulary instruction, compared to pattern-based spelling activities common for the age level.

On the opposite side of the instructional spectrum, teachers Rita (Thomas Elementary) and Laura (Harris Elementary), both from Title I schools, were focused on remediation for low-performing students. For Rita, she identified the ELL needs of her students and planned activities accordingly, “Activities are based on teaching 2nd grade students, none of which are native English speakers, step writing, student-made word search puzzles, identify long/short vowels and patterns, identify blends/digraphs” (Rita, fall journal, November 15, 2016). For Laura, her approach was to identify when students were struggling and make adjustments, “Using the feature checks to change groups as needed” (Laura, fall journal, November 22, 2016). The ability to make adjustments and provide applicable activities were important for reaching low-performing students, especially with his ELL populations such as Thomas Elementary and Harris Elementary.

For the final data collection point of the winter journal, teachers were asked to give input on their progress reaching their lowest group of students. Teachers were asked, “How has word
study instruction addressed the gap between the highest and lowest performing students in spelling and vocabulary?” (see Appendix B). In response to this question, the 19 teacher responses were grouped into three categories:

- Closing the gap
- Not sure closing the gap
- Somewhat closing the gap

As outlined in Table 9, all responses found some element of success, evident in zero teachers reporting that no progress was made closing the gap. The most frequent response (47%) was for the “closing the gap” category, in which teachers had seen clear improvement for their lowest group of students. Noted in Table 9, comments by Marie emphasized the “most improvement” (Marie, winter journal, February 16, 2017) for her struggling students, and Lucy described how the achievement gaps were closing for “both spelling and vocabulary” (Lucy, winter journal, February 17, 2017).

The next highest category (42% of responses) was “not sure closing the gap” which grouped teacher responses that had seen signs of growth, but were not yet certain that the achievement gap was closing. For example, Tiffany had only identified some student progress, as her higher groups were “improving in their written work,” but she was not so confident in her lowest students (Tiffany, February 7, 2017). Similarly, Brianna saw uneven progress, “I feel like the students that are performing solidly on grade level are making the most strides. My lower performing students do not always do well.” (Brianna, February 15, 2017). For these teachers, additional time and further assessment was necessary to determine the level of growth for their students.
The category “somewhat closing the gap” represented teachers who had determined some growth, but did not identify class wide benefits. This small group of responses (11%), is best represented in the statement by Matt:

“IT has helped to close the gap a little bit, at the start of the year I had 8 students in my lowest group, 5 in my middle and high group. Now I have 6 in my low group 7 in my middle and 5 in my high group. All groups though are fairly close in ability.” (Matt, winter journal, February 6, 2017)

Matt determined his progress by noticing students moving upward in their spelling groups and a shrinking group of low students.

Table 9

* Winter Journaling – Student Achievement Gap

<table>
<thead>
<tr>
<th>Open Codes</th>
<th>Frequency</th>
<th>Percentage</th>
<th>Examples of Basic Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Closing the gap</td>
<td>9</td>
<td>47%</td>
<td>“All students have improved, but the most improvement has been evident in my lowest group.” (Marie, February 16, 2017).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“I think it has closed the gap in both spelling and vocabulary especially for one of my special ed students.” (Lucy, February 17 2017).</td>
</tr>
<tr>
<td>Not sure closing the gap</td>
<td>8</td>
<td>42%</td>
<td>“The gap in my classroom is fairly a wide range. I do notice my two high groups improving in their written work in the classroom. I can not say I see that with my two lower groups.” (Tiffany, February 7, 2017).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“I feel like the students that are performing solidly on grade level are making the most strides. My lower performing students do not always do well.” (Brianna, February 15, 2017).</td>
</tr>
<tr>
<td>Somewhat closing the gap</td>
<td>2</td>
<td>11%</td>
<td>“I am not sure the gap has closed but ALL students are making gains. Differentiated instruction helps ensure that all students are learning the skills that they are ready for.” (Steve, February 12, 2017).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“IT has helped to close the gap a little bit, at the start of the year I had 8 students in my lowest group, 5 in my middle and high group. Now I have 6 in my low group 7 in my middle and 5 in my high group. All groups though are fairly close in ability.” (Matt, February 6, 2017).</td>
</tr>
<tr>
<td>Total</td>
<td>19</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

* Note: No participants described clearly not closing the gap
Reviewing the categories of responses in Table 9, combining “closing the gap” and “somewhat closing the gap” includes a majority of response (58%) determined that word study was making a least some progress closing the achievement gap. The remaining respondents (42%) were unsure, but not positively against the potential benefits. Cumulatively, Table 9 reflects the overall positive sentiment teachers presented about word study and achievement gaps.

Data analysis regarding research question three, exploring teacher responses to word study challenges presented multiple themes. Teachers predominantly addressed at-risk and SPED students through more frequent meetings and smaller group sizes. For teachers at Newport, shorting the list was applied, while teachers at Thomas used team collaboration to share students and provide more detailed instruction. ELL students were supported with pictures included with their sorts and additional ELL teacher follow-up for word list practice. As teachers entered the school year, most aimed to build upon the previous year to make enhancements for the next school year. The leading categories were “choice and variety” (26%) as well as “curriculum integration” (26%), demonstrating an interest in new and different practices. In terms of differentiation, the interest in certain practices depending on the background of the school in which the student studied. Higher SES schools were more interested in enrichment, while lower SES schools were more concerned with remediation.

**Research Question Four**

The fourth research question, “What do different forms of administrator and student feedback suggest about teachers’ word study instruction?” intended to provide further triangulation by incorporating a different type of data and source. One type of data was a classroom observation of each teacher implementing an aspect of word study. This data point
was unique compared to self-reported interviews and surveys, because it relied on what authentically observed in the classroom. Another source providing unique perspectives was in-person interviews held with the principal at each participating school. The principals were able to provide a big-picture view of word study in the school and describe the efforts of teachers on a grade level.

For the classroom observation, appropriate times were scheduled with teachers to observe components of word study instruction. Although scheduling had to be coordinated to the needs of the teachers and their very busy schedules, the general goal was to collect a range of experiences that reflected different aspects of the weekly word study routine. The activities observed could be grouped into three basic categories:

- **Word sort instruction** – introduction of the patterns and features of a sort, typically conducted at the beginning of the week with a small group
- **Classwork activities** – student practice with word sorts building understanding over the course of a week with a range of structures and formats
- **Word sort assessment** – a summative and/or formative assessment on a group’s word sort list

Observations took place after the teacher interviews and fall journals over the course of the first and second marking periods. Along with classroom observations, artifacts were collected from teachers connected to lessons (e.g. student work, test paper, instructional resource). Teachers were also interviewed following the observation to incorporate insight to the experience and answer researcher question. Although ideally categories would have been equal, limitations based on scheduling with teachers could not always specify the type of observation.
The following number of observations were conducted for each category:

- Word sort instruction – 6
- Classwork activities – 8
- Word sort assessment – 5

These activities presented a range of experiences across the six second grade teams. By observing multiple teachers, it enabled comparing and contrasting within a team. Furthermore, it allowed comparisons between multiple schools with distinct educational contexts. The approaches of different second grade teams could be compared, providing insight to the collaboration of teachers within a school.

For the six lessons that focused on word sort instruction, the main differences existed between schools, including the length, frequency, and components of lessons. At Eagle Hill Elementary, Melissa’s classroom and Erika’s classroom both demonstrated how team collaboration could maximize differentiation (Melissa, observation, December 9, 2016; Erika, observation, December 5, 2016). The second grade team at Eagle Hill established a weekly time for students to switch between classrooms and receive different levels of instruction. Melissa taught a detailed sort introduction with ending blend sounds (e.g. –st and fast) to a small group of seven students, while Erika worked with a higher-level group (11 students) with short and long “o” vowel sounds (e.g. stock, mow, loaf). By grouping and switching students across the grade level, the team was able to teach multiple word study skills to groups of varying sizes. This process of switching was also in place at Thomas Elementary and noted in observations of Steve (Steve, observation, January 17, 2017) and Rita (Rita, observation, January 30, 2017). Although the populations of Eagle Hill (high SES) and Thomas (low SES) were very different, both groups
of teachers applied a similar approach to meet a range of student needs. In Steve’s introductory lesson, he was able to incorporate the following components into his word sort introduction:

- Student exploration though open sort to predict word categories
- Teacher introduction using interactive whiteboard of words with definitions
- Explanation of column headers by teacher
- Students sort words into categories
- Teacher monitors to provide corrective support when needed

This approach was very in-depth as the teacher only focused on a single sort to a single audience. Steve appreciated this collaborative structure for word study, because it offered “differentiated practice” and enabled the teacher to be “efficient when switching” (Steve, post observation interview, January 17, 2017). Preparation was evident as Steve used an interactive presentation on the whiteboard, revealing each specific word as he sorted them into categories. Rita also had a comprehensive lesson, but instead of the whiteboard, she met with the small group at their seats and explained each word. Furthermore, she challenged the students to organize their words into alphabetical order and supported as needed one-on-one. The classwork and homework schedule was consistent, which was useful for teachers and students, because mid-week activities had to be monitored in homerooms.

On the opposite end of the spectrum was Dover Elementary and Dale Elementary, where teachers worked mostly independently for word study. At Dover, all word study took place in the general classroom, warranting often rushed and abbreviated lessons due to limited windows of time to serve multiple groups. The restrictions of homeroom based word study was evident in Matt’s classroom, as he did quick introductory lessons without attending to word definitions (Matt, observation, January 9, 2017).
Furthermore, without team expectations, consistency varied more between classrooms, which was shown at Dale. For example, Kate decided based on the busy mid-year testing schedule, she was not teaching multiple sorts the week of her observation and chose to do a whole-group lesson on contractions (Kate, observation, October 17, 2016). Kate explained her need to alter her instruction as it was “hard to follow word study progression with schedule interruptions” (Kate, post observation interview, October 17, 2016). If second grade teachers at Dale Elementary switched students, Kate would not have been able to change her word study purpose that week without coming to a consensus with her teammates. As demonstrated across observations, the approach of the specific team heavily influenced word study introduction outcomes.

Classwork activities had the greatest variance between schools and teachers. Classwork generally describes the days between word sort introduction and assessment in which students build their understanding of their word lists. Variation of the eight classwork activities was influenced by the purpose of the activity and/or the overall structure of the classroom. Considering purpose, some activities were used for basic familiarity with the words and were similar to traditional spelling activities. These activities were often utilized for students to be engaged while the teacher was instructing a small group. For example, Marie’s students were working on a written sort using “rainbow words” in which they sorted the words into the pattern columns, while writing each letter with a different color (Marie, observation, December 15, 2016). During this rainbow writing activity, Marie met with a small reading intervention group to practice fluency skills. Another example was observed in Brianna’s room as she met with a guided reading group, while students at a word study center created words out of magnetic letters and pipe cleaners (Brianna, observation, December 15, 2016). Similar to rainbow words, this
activity addressed the most basic level of understanding (word spelling) and did not incorporate pattern comparisons and word meaning.

Other activities were more comprehensive and incorporated multiple levels of word list understanding. The activity in Tiffany’s classroom incorporated two levels of understanding as students first completed a written sort in their word study notebooks and then found a peer partner to practice testing one another using word list words and sort boards (Tiffany, observation, December 13, 2016). Although a simple activity, students had to shift from visual to auditory clues to spell words. Word patterns for similarly spelled words were useful, rather than word memorization. In addition, Tiffany explained that she valued the activity because, “Students enjoy working with partners. It is fun and engaging” (Tiffany, post observation interview, December 13, 2016).

Another partner lesson was utilized in Taylor’s classroom, as students practiced speed sorts that emphasized automaticity to sort words quickly and with accuracy (Taylor, observation, January 19, 2017). The partner activity reinforced spelling and patterns, while adding social motivation and a peer monitoring. The speed sort activity was also utilized by Suzanne’s class (Harris Elementary), demonstrating program consistency (Suzanne, observation, January 12, 2017), even though the Taylor was in a different school (Thomas Elementary). Rachel’s classwork activity sorted words in writing, but had a unique aspect as students were expected to write words in alphabetical order (Rachel, observation, January 11, 2017). Although not a component of pattern or word meaning, the language arts skill could be practiced effectively with word sort cards.

Approaches planned by Laura and Tina incorporated student choice and different levels of understanding. Laura utilized a spelling activity bingo board with her students, providing
choice while requiring students to complete certain options of activities that created an overall balanced level of understanding (Laura, observation artifact, January 20, 2017). Tina’s word study choices were notably detailed, as she developed quarterly word study activity books with developmentally appropriate activities for students to complete with their word lists (Tina, observation artifact, January 30, 2017). Her word study books incorporated options in classwork and homework over the week and included meaning and definition practice beyond basic spelling development. Word study book activities included dictionary practice, sentence writing, and cursive writing. Overall, the word study books created a comprehensive exploration of words each week. For the eight word study activities observed, the purpose and design of the classwork schedule was unique and connected to the assessment outcome.

Five word study assessments were observed in the study, demonstrating how teachers monitored student progress weekly or biweekly. Based on the collaboration between teams and the interest in common assessments, many teams had agreed upon practices for testing and grading word study. For Tracy’s observation (Tracy, observation, December 16, 2016) the assessment format was shared across the grade level and the teachers collaborated in the design. Reviewing the assessment artifact from Tracy’s observation (Tracy, observation artifact, December 16, 2016), the word study test was multi-faceted, including word list words, transfer words, dictated sentences, and definition matching. Tracy and her team at Dale Elementary shared the most comprehensive word study assessment structure, addressing spelling, pattern, and meaning components. As explained by Tracy, the test was designed for specific skill analysis to “break tests into separate strands for each section” and the incorporation of transfer words sought to “test extension skills” (Tracy, post observation interview, December 16, 2016). One area of limitation though was dictated sentences, as student-created sentences would have
been more authentic and challenging. At Eagle Hill Elementary, Betty and her team used a very similar grade level assessment to Dale Elementary, although the sentence writing aspect was removed altogether (Betty, observation, December 9, 2016).

In contrast, other schools selected different components for their assessment program. Donna and Lucy utilized assessments with word sorting, spelling transfer words, and writing dictated sentences (Donna, observation artifact, December 2, 2016; Lucy, observation artifact, December 16, 2016). This assessment challenged students to use word patterns to spell, but did not assess word meaning. Teaching a high ELL population, Nancy’s word study assessment included directions in Spanish and directed students to match and glue pictures with words (Nancy, observation artifact, January 13, 2017). As some ELL students were unable to read complete words in English, matching beginning sounds with pictures was an appropriate task.

Data were also collected regarding aspects of word study across all participants. Using an observation checklist (see Appendix C), consistent data were sought and collected. For certain aspects, data were either yes, no, or unobserved. Data that were unobserved did not determine whether the component was utilized in the classroom, rather not applied with the given activity and/or at that time of the observation. The following characteristics were recorded for all observations:

- Multiple sorting groups
- Contextual and/or definitional instruction
- Active student engagement with words
- Deep processing with words
- Skill application with reading and/or writing
To visually represent responses for comparison, the data regarding these five different practices have been outlined in Figure 5. The data displays the very strong presence of practices such as “multiple sorting groups” and “active student engagement with words,” moderate evidence of “deep processing with words” and the more even distribution of “contextual/definitional instruction” and “skill application to reading and writing.” For the characteristics that were unobserved, although not definitive information that the practice was not present, the response is valuable in comparison to practices that were consistently present (e.g. active student engagement with words).

Figure 5

*Word Study Observation – Classroom Practices*

![Word Study Observation Diagram](image)

*Note: 19 participants observed during a range of word study activities.*
The category of “multiple sorting groups” refers to the method of differentiating instruction by teaching more than one word study feature (e.g. word sort list). This is a critical difference between traditional spelling instruction, which utilizes a single spelling list class-wide regardless of student knowledge and/or abilities. This theme remained strong across observations as 95% of teachers utilized multiple groups. Multiple examples of small group instruction were noted during observations, using a variety of forms and methods. Melissa met with a small group of seven students, learning Letter Name stage consonant blends (e.g. *fast*) during introductory lesson (Melissa, observation, December 6, 2016). The group size was small because the grade level switched students between classrooms and the number of well-below level students happened to be small. For word study assessment, Tracy’s class used a different structure, when she tested three word study groups efficiently through the assistance of two parent volunteers (Tracy, observation, December 16, 2016). Matt on the other hand, met with all of his students within his own classroom (Matt, observation, January 9, 2017). This required brief meetings in order for the teacher to meet with multiple groups. Matt’s meetings were quickly held at the side kidney bean shaped table as he introduced each word sort column, but did not take time to focus on word definitions and usage.

Another observational category was “contextual or definitional instruction,” which referred to teachers incorporating instruction on word meaning into their program. This approach goes beyond just word patterns and accurate spelling, but extends to understanding the multiple definitions of words and their application in sentences.
This characteristic was only moderately identified in observations, as outlined below:

- Yes – 47%
- No – 16%
- Unobserved – 37%

The unobserved component described an activity where meaning and/or definition was not applicable. It is possible in the unobserved classrooms that the teacher focused on meaning at a later time in the week. Considering the data as a whole, it can be noted that more often than not definitions were not a consistent aspect of word study instruction (53% “no” and “unobserved”). When it was incorporated, it was evident in multiple ways. In Betty’s classroom, students had to complete a term and definition matching exercise as a part of their weekly word study test (Tracy, observation, December 16, 2016). During the word sort introduction, Erika met with her group and explain word pronunciation and word meaning in addition to the sorting of words by patterns (Erika, observation, December 6, 2016). On the same team as Melissa at Eagle Hill Elementary, Erika’s students switched between classrooms for instruction, enabling a more detailed instructional focus on a single list for each teacher. For activities where meaning was not incorporated, students were often doing traditional spelling activities. This was seen in Brianna’s classroom at Newport Elementary as students were engaged in a word study center, making words out of magnetic letters and pipe cleaners only focused on the accurate spelling of words (Brianna, observation, December 15, 2016). Also at Newport Elementary, Rachel’s students sorted words and wrote them on dry-erase boards, concentrating on spelling and identifying patterns (Rachel, observation, January 11, 2017). The activities by Rachel and Brianna had benefits for spelling, but did not move students toward a more complex understanding of words.
The most consistent spelling characteristic was “active student engagement with words,” which defined students comparing and contrasting words to build understanding. Active engagement would be in contrast to memorization of word sort words, such as memory games or flash cards to remember spelling. Teachers regularly incorporated active engagement (100% of observations), challenging students to categorize their words to assist with spelling and definition. Engagement was evident during different activities as students sorted words during introductory practice, classwork activities, and summative assessments.

The last word study category explored was “skill application to reading and writing,” which looked for teachers integrating other aspects of language arts into their word study instruction. Similar to observations of definitional instruction, responses were not consistent:

- Yes – 47%
- No – 6%
- Unobserved – 47%

Although the “no” category was a small 6% and “yes” was a considerable 47%, the “unobserved” category demonstrated a lack of frequent reading and writing practice in the classroom. For situations when reading and writing practices were identified, different activities were used. In terms of assessment, Donna’s class incorporated multiple skills into the weekly tests. Students were required to demonstrate knowledge of words in different ways, including spelling, sorting, and writing sentences (Donna, observation, December 2, 2016). Assessment in Betty’s class had a slightly different approach, requiring students to spell words, decode new words, and match definitions with words (Betty, observation, December 2, 2016). Although matching definitions and spelling transfer words involved reading and writing, the level of challenge was reduced compared to Donna’s students writing novel sentences. Reading and
writing was also included in certain introductory lessons, such as Laura’s class, where students completed a choice menu board with 16 different activities (Laura, observation, January 19, 2017). Menu writing-connected activities included individual sentences as well as story writing. Overall reading and writing was present in different word study components, but application was inconsistent across the entire sample.

Meeting with school principals sought to provide another perspective on the experience of teachers. Not only could the principals comment on the specific second grader teachers within their school, they were also uniquely able to observe the interaction of the team and compare different practices. During discussions, principals explained their views on the successes and challenges for teachers using word study, as well as their role supporting as an administrator (see Appendix J). Table 10 outlines the principal responses about teacher word study experience with certain administrators listing multiple factors for the same questions.
Table 10

Principal – Word Study Successes, Challenges, and Support

<table>
<thead>
<tr>
<th>Principal</th>
<th>Successes</th>
<th>Challenges</th>
<th>Support</th>
</tr>
</thead>
</table>
| Lewis     | Transfer of Spelling Skills  
Vocabulary Growth | Group Management  
Remediation  
Lack of Time | Identify Needs/PD  
Support Teams/CLTs |
| Wilson    | Transfer of Spelling Skills  
Vocabulary Growth | Lack of Time  
Transfer of Spelling Skills | Identify Needs/PD  
Support Teams/CLTs  
Time/Scheduling |
| Conner    | Differentiation of Instruction  
Transfer of Spelling Skills | Need for PD  
Transfer of Spelling Skills | Identify Needs/PD  
Support Teams/CLTs |
| Smith     | Transfer of Spelling Skills | Need for PD  
Lack of Time | Support Teams/CLTs  
Time/Scheduling |
| Miller    | Differentiation of Instruction | Parent Communication  
Lack of Time | Set Expectations  
Support Teams/CLTs  
Time/Scheduling |
| Benson    | Differentiation of Instruction  
Transfer of Spelling Skills | Remediation  
Parent Communication  
Lack of Time | Identify Needs PD  
Set Expectations |

* Note: CLT refers to Collaborative Learning Team. ELL refers to English Language Learners. PD refers to Professional Development.

The most common success expressed by principals was “transfer of skills” (50% of responses) describing the connection of word study to reading and writing. These responses did not concentrate word study formative and summative assessments as success in themselves, rather an avenue to achievement in other areas. This transfer was described by Principal Smith, “I think that word study is an opportunity for students to take an individual sort of discrete specific skill and learn then how to apply some of those skills in their work” (Smith, principal interview, February 9, 2017). Success in these terms is application and for students to build automaticity of learned concepts so they become applicable. Applicability was emphasized by Principal Wilson:
I think generally, particularly in the lower grades, I think it does help the kids to, to learn and internalize those sounds, um because as they’re learning to read, they’re learning to write and so they go hand in hand and they’re, they’re really applying that learning in word study into their writing. (Wilson, principal interview, January 9, 2017).

Although Principal Wilson spoke more enthusiastically about the lower elementary grades for word study, the usage of these concepts in other literacy areas was advantageous. This sentiment was further reinforced by Principal Conner, particularly for writing:

I believe that is one of its greatest strengths of the program is to allow for children to grow their spelling and also the application piece of it as well. Um, you know, I see our staff doing is really encouraging children based on where their levels are because it’s so well coordinated to where their writing is and also with their reading. So we’re seeing similarities in their work across the board. Um encouraging them um to be using it and applying it to their writing as well. (Conner, principal interview, January 24, 2017)

The theme of transfer was important across the interviews, not only mentioned by multiple participants, but discussed at length.

The next most common theme (30% of responses) was “differentiation.” This theme emphasized providing multiple levels of instruction to suit the varied background knowledge and skill levels of students in the classroom. The overall advantage was described in detail by Principal Miller:

So I definitely think the positives for word study is that it is, it, teachers have the ability to differentiate and make the lessons developmentally appropriate for them and there are assessments along the way that you can use to um make sure you are appropriately providing the right group for each child. (Miller, principal interview, February 16, 2017)
Word study provided an alignment of instruction with student needs, along with appropriate diagnostic and formative assessment to monitor progress. In particular, the differentiation component of word study was appreciated in contrast to traditional spelling instruction. Historically traditional spelling methods applied classwide lists only varied based on age or grade level. The advantage of word study was outlined by Principal Benson:

I think it was very concrete, when we were in school like okay, you have a spelling test and these are your ten words that that you have and not matter what. If you were the, the highest students, or the lowest of students, everyone had the same lists. So I think when we differentiate word study it is definitely a pro to it and just teaching those students those phonics skills as well as how to use your phonics skills to help you actually spell words. (Benson, principal interview, February 14, 2017)

Principal Benson provided clear comparisons between word study and traditional programs, describing benefits for all levels. This differentiation was valuable to Principal Benson, considering the population of the school was a majority of low-income and in need of ELL support.

The final area of success was “vocabulary growth” (20%), which represented the smallest percentage of responses. Two principals recognized the ability of word study to enhance overall understanding of words. Simply stated by Principal Wilson, “And you can see the kids really thinking about their sounds, stretching out those words, umm you know they’re learning general vocabulary as well.” Principal Wilson saw the larger progression of understanding across grade levels, as students progressed along a continuum of knowledge from phonics, to patterns, and eventually more complex vocabulary knowledge. Principal Lewis sought word study as an avenue to enhance vocabulary for their large ELL population:
Well, especially for a population like ours, um because vocabulary is a deficiency for the most part a lot of our students, it gets um our students… it builds their vocabulary. So um, I would say for a majority of them and not even if they’re, even if they’re not ELL, it still builds their vocabulary. Um, so students are constantly learning new words and learning new words. So and not just learning new words, but in context and umm having teachers to explicitly teach vocabulary to them. So I think that’s a good thing. (Lewis, principal interview, January 26, 2017)

Principal Wilson valued the ability for teachers to differentiate instruction to enhance the vocabulary of not only ELL students with language deficits, but also students with a range of vocabulary knowledge.

In terms of challenges, principals identified 12 obstacles that could be grouped into five categories. The categories of response in order of frequency were the following:

- Need time – 36%
- Need PD – 14%
- Lack of transfer – 14%
- Parent communication – 14%
- Remediation – 14%
- Need group management/organization – 7%

The leading category of responses was “need for time” (42%), as principals recognized the struggle for their teachers to meet multiple learning objectives within a limited instructional day.
In fact, when describing challenges, three principals mentioned “time” in the very first sentence:

- “The one piece that comes up is just the time component, when do they fit it in and how do they best fit it in” (Smith, principal interview, February 9, 2017).
- “The cons of word study, um I think, um it’s finding the time” (Lewis, principal interview, January 26, 2017).
- “I think the negatives at times come along when um finding time in the language arts block, given the number of things that we do” (Miller, principal interview, February 9, 2017).

Whether through their own observations or feedback from their teachers, a majority of principals recognized the frustration teachers experienced allocating the time necessary to teach word study. This viewpoint matched the responses of teachers, who considered “time” highly difficult in both their teacher interviews (24%) and winter surveys (31%). These principals recognized the value, yet were concerned about its place within the larger language arts block.

A need for professional development accounted for 17% of responses, as principals recognized the value to teachers understanding the philosophy of word study and effective methods of implementation. In terms of buy-in, Principal Smith connected teacher understanding with teachers remaining dedicated to the program, “And I think making sure they understand the value to word study. It helps them understand the importance of doing it with fidelity and carving out that time” (Smith, principal interview, February 9, 2017). Principal Conner desired professional development to further refine teacher practices beyond their basic understanding, “Just their knowledge of spelling, it’s still a growing area we need further staff development. Very purposeful training staff development, then and how does that align with our DRA, and so on and so forth” (Conner, principal interview, January 24, 2017). Professional
development needed to be more targeted in Principal Conner’s view, connected to the other programs and assessments used at Newport Elementary.

Another challenge aligning with teachers’ concerns was a lack of transfer of skills, which accounted for 17% of principal responses. In these responses, principals were not seeing the application of word study in other areas of the curriculum and the utilization of expanded word knowledge to enhance other areas of literacy development. This concern was addressed very straightforwardly by Principal Wilson, “I think word study, umm, is kind of a, its own little entity in the upper grades and really is not tied to unfortunately anything else they are learning.” Principal Wilson highlighted the difference in instructional goals in the upper and lower grades. In the primary grades, the focus is predominantly on literacy instruction and students are developing initial reading skills. In the upper-elementary grades, curriculum also considerably focuses on other subject areas (e.g. math, science, social studies), which deemphasizes the focus on literacy instruction (e.g. word study). These differences can make it challenging to see considerable transfer of word study knowledge to other areas of the curriculum in the upper elementary grades.

The next category representing 17% of responses was “parent communication,” which referred to the difficulty of explaining the purpose of word study and increasing parent involvement. Challenges in “parent communication” involve different socio-economic levels. As described by Principal Benson, poor parent involvement can be a challenge in low SES communities, “We don’t have the support of the parents here. Sometimes they don’t even know what the words are. So they are doing it by themselves at home, which isn’t always the right thing to do. Sometimes they do it here at school to also have the practice” (Benson, principal interview, February 14, 2017). To meet the needs of the less involved community, the principal
sought to incorporate more word study practice at school. In Eagle Hill’s community, some parents were seeking more homework, while others requested less. Principal Miller explained these conflicting views, “I get pressures on both ends of parents that say it’s too much going home and why am I doing this. And I got other parents saying why can’t my kid practice at home?” (Miller, principal interview, February 16, 2017). Such a challenge suggests a lack of need for parent education and clearer communication about word study instruction.

A final category described by Principal Lewis was a need for group management and organization with the word study program:

I think a lot of teachers umm, especially with maybe SPED students, it’s hard to find enough adults for the groups. So you can have those students who are on grade level and those students that are middle of the road, but for those students who are really, really low, sometimes it’s just hard for a teacher to find time to meet with all those groups.

(Lewis, principal interview, January 26, 2017)

When students present a broad range of word knowledge, a classroom must be sometimes divided into more groups than are easily manageable. Principal Lewis identified this challenge in her Title I school and understood teachers needed multiple adults to meet with different groups to meet students’ needs.

The final interview topic discussed with principals was in response to the question, “What is your role in the implementation of word study in your school?” This question sought to understand how principals supported their teachers and potentially addressed the challenges they knew existed.
The three categories of responses and their frequency were the following:

- Support CLTs – 42%
- Identify PD Needs – 33%
- Time/Scheduling – 25%

The leading category of support was focused on the collaborative learning teams, which describes the groups of grade level teachers who meet consistently to review data, plan and develop curriculum. By coordinating with the teams and/or communicating with team leads, principals were able to stay informed and provide assistance. To start the school year, Principal Wilson worked with teams to plan:

   Basically I try to work with the teams of teachers, on you know, um supporting their implementation of the program, so at the beginning of the year we usually have a discussion on the grade levels about word study and how we’re going to approach it.

   (Wilson, principal interview, January 9, 2017)

As the year progressed, Principal Conner sought to remain engaged with teams and provide support when necessary in response to team requests. Principal Conner described the ongoing dialogue as follows:

   So my role is to be trusting of our staff and I’d say that’s the biggest one. But you know, as part of that too, I attend CLT meetings, so I’m hearing that conversation. You know in there and may be asking reflective you know types of questions and then I’m not at a point or a need, when I say hey we need to do this because it’s already being done.

   (Conner, principal interview, January 24, 2017)
Through the continuous conversation, Principal Conner was challenging teams to improve their word study program and support when needed. In addition, Principal Miller stated the importance of setting expectations for teams:

So my role is to work with the grade levels to set the expectations of how word study will look for the grade levels. As a principal, I do believe in the value of um collective voice, and have given a ton to the teams on how they want to implement word study. So we do have some nuances amongst each grade level. Um, but my role is to set the understanding, expectation that it is a requirement that we are, we do, have word study.

(Miller, principal interview, February 16, 2017)

Principal Miller balanced the need for team autonomy and ownership for instruction, along with setting baseline requirements for key elements of the word study program. This demonstrated Principal Miller’s understanding of word study in order to have a clear vision of the critical aspects.

Representing 33% of principal responses, “identifying professional development needs” was viewed as a responsibility for principals. This included observing and communicating with staff to identify needs and then seeking and providing the appropriate support. Principal Lewis described the support process in this way:

I believe first is to make sure teachers have the training they need…. So I’ll call teachers in and say you know I was in observing reading today, tell me how do you think that went. And you know nine times out of ten they already know that you know, I know my word study group is not flowing like it should and I’ll ask them tell me what you need. And then I’ll suggest to them what I think they will benefit from and then I have a dialogue with the reading team. (Lewis, principal interview, January 26, 2017).
Principal Lewis makes the connection between classroom observations to teacher conferencing to enable teachers to reflect and identify their needs. Rather than assigning professional development, Principal Lewis promotes staff to be self-directed in literacy instruction and then utilizes the reading team at Thomas Elementary. Similarly, Principal Benson valued teacher autonomy and recognized the importance of training:

Providing the training. They were trained two, um a year ago, in word study. So probably just to follow up and to help sustain the momentum of word study. To help create the buy-in and the purpose of doing actual word study. And always bringing of the correlation between word study and also your word work and your sound boxes as you learn in Pathways. As well as let them see how it’s all connected and how it can best support students. (Benson, principal interview, February 14, 2017)

For Principal Benson, professional development is not training teachers in a new program, rather a continuous cycle of refining and improving practice, while connecting multiple aspects within a curriculum. Even in situations where the program has remained consistent, schools need to reevaluate the methods and purpose of a training in connection with other developments in the curriculum. Overall, the principal responses to professional development were responsive to teacher needs and the overall learning goals of the school.

The final area of support described by principals was “time/scheduling” for teachers (25%), which described assisting teachers in finding the time to teach word study. For principals, the authority to adjust schedules and redefine expectations is in their control, which can be utilized to support teachers making instructional plans. This supportive approach was described by Principal Smith as follows:
One of the things that often gets shared is the time component and how, and often times teachers struggle to fit everything in and we want to be able to help them make good decisions about the time. So time allocation, maybe what can get carved out, what needs to be more robust. (Smith, principal interview, February 9, 2017)

For all three areas of support, the principals relied on collaboration with teachers to recognize student learning needs, make instructional decisions, and provide professional development. Rather than a making independent choices or simply following instructions from central office, these school administrators sought input from teachers to make decisions.

**Research Question Five**

The fifth research question, “How do teacher experience and professional development background influence word study instruction?” addressed personal teacher factors and their impact on word study. More specifically, questions sought to understand each teacher’s own spelling development as a student and later professional learning about word study as a teacher. Data were collected regarding these topics through the initial teacher interview and fall journal (see Table 2), asking teachers to be reflective on their own personal learning experiences and needs as a teacher.

During teacher interviews, teachers were asked to be reflective about their spelling development through the question, “What was your experience learning spelling as a child?” (see Appendix A). Categorizing all 19 responses, three common groups were identified: positive, negative, and neutral. The division of responses are shown in Figure 6, illustrating the small group of positive responses, in contrast to the moderate size neutral and negative groupings.
Reflecting on the largest category of responses (42%), most teachers were neutral and had neither noticeably positive nor negative responses. These responses were rather indifferent to the outcomes, simply explaining the general process of their spelling experience:

- “We got spelling words every week. We memorized them and we took a test on Friday and we wrote them” (Betty, teacher interview, September 13, 2016).
- “I just remember everyone had the same assigned lists. And (pause) I don’t even remember what homework we did with it, but I just remember taking the test on 20 words on Fridays” (Donna, teacher interview, September 19, 2016).
- “It was everybody had the same book and it was always, 10 words and you wrote them. You had a different activity every day, but everybody had the same words. And
didn’t change, they just got harder as the year went on” (Matt, teacher interview, September 12, 2016).

These neutral responses often recognized the memory-based spelling approach and a lack of differentiation as all students learned from the same list of words. Teachers sharing negative experiences were the second most common category (37%), which highlighted struggles and challenges teachers faced learning spelling in school. The methodical process was not appreciated by certain teachers, as explained by Taylor, “Drill and practice. Rote. Spelling tests every Friday and I’m a horrible speller now” (Taylor, teacher interview, September 11, 2016).

Beyond a lack of success, some teachers described particularly difficult experiences that hampered their confidence. This struggle with spelling was described by Suzanne:

Spelling was very hard for me. I did not have a phonics background when I started, when I started public school, because I went to a Montessori kindergarten. So, I was behind in first grade and so I really feel that was, that kept me back from spelling. I just didn’t like it and fought with my mom on homework for it. (Suzanne, teacher interview, September 19, 2016)

These emotional experiences were memorable for teachers, as Suzanne recalled her resistance to doing homework as far back as first grade. Negative past experiences could have positive future outcomes, as Melissa explained:

I was a terrible speller. Uh, when I took that course through UVA I think I actually learned how to spell. I was so excited because I never was a good speller. Everybody in my whole family was a good speller except for me. I don’t know why. I can really relate to those kids that struggle with it, because spelling was just not intuitive to me at all. (Melissa, teacher interview, September 9, 2016)
In this situation, the difficulties Melissa experienced enabled her better relate to children without innate phonological awareness and reinforced her belief in classroom differentiation. The University of Virginia (UVA) course on word study opened a window for her to support different spelling abilities in her classroom and created a supportive learning environment where all students could have success.

Positive responses were also present in interviews and 21% of teacher responses described success as a student. Teachers such as Rita enjoyed spelling, because she had high achievement, “I was a great speller. I loved getting my spelling words. I practiced them. I always got great spelling grades” (Rita, teacher interview, October 27, 2016). The positive experience for Rita came from the validation of her grades, rather than the classroom activities and/or process of learning. Kate also expressed an indifference to the instruction, while sharing her positive feelings about spelling, “We did random words, 1 through 20. Umm, there was no rhyme or reason to them. I enjoyed them because I’m a good speller” (Kate, teacher interview, September 27, 2016). Tina’s positive view recognized the connection of reading abilities to success in spelling, “I loved it. Very positive. But then again, reading was very easy, so spelling was very easy (Tina, teacher interview, September 15, 2016). In Tina’s response, she disconnected classroom instruction from her spelling growth, attributing her advanced reading knowledge as the foundation for her success.

Combining negative and neutral categories, 79% of teachers did not have a positive view of their spelling experiences. For the 21% of teachers who did have success, none contributed their growth to the quality of the instructional program, rather their effort and/or natural ability. Finally, it should be taken into consideration that none of the 19 teachers described a word study.
program as part of their student experience, or even a differentiated program with similar components.

Professional development was the next area explored for teachers, seeking to understand their experiences learning and refining word study instruction. During the interview, teachers were asked the following:

- Do you feel adequately prepared to lead word study instruction in your classroom?
- What training, coursework, and/or experience helped prepare you?

The teacher interview sought to identify the type of professional development teachers had experienced, as well as the level they felt prepared for instruction.

Categorizing the interview responses regarding level of professional development, three main groups were identified: need for more PD (professional development), received adequate PD, and received quality PD. In Table 11, the categories, frequency of responses, and examples are outlined:
Table 11

Teacher Interview – Level of Professional Development

<table>
<thead>
<tr>
<th>Open Codes</th>
<th>Frequency</th>
<th>Percentage</th>
<th>Examples of Basic Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need for more PD</td>
<td>7</td>
<td>36%</td>
<td>“I may need a little bit more training. I’m ok, but I want, I want to learn more and I think I need to do it more to become comfortable.” (Taylor, October 11, 2016). “The only thing that I struggle with is understanding what all the different levels are and what they mean. I know when we grade the DSAs I have to ask someone what order they should be in when you like grade them.” (Marie, September 16, 2016).</td>
</tr>
<tr>
<td>Received adequate PD</td>
<td>6</td>
<td>32%</td>
<td>“We had a class through the county, but then I had some friend were no longer in second grade who took a course and then they in turn took what they learned in their course and taught it to the team. That was good. That was very helpful.” (Tiffany, September 19, 2016). “So it really was a matter of having a copy, or copies of whatever levels I had, of the books and going through those books and reading the teacher notes and hoping that the teachers’ correlated to the sorts on the next page.” (Rachel, October 5, 2016).</td>
</tr>
<tr>
<td>Received quality PD</td>
<td>6</td>
<td>32%</td>
<td>“When I was in college I took college courses, but then when I first started school my team trained me and then we had Pathways training that developed it more.” (Tracy, September 12, 2016). “I did Pathways word study through the county. I learned some things in college and my mentor was really good showing me how to teach word study and assess using the DSA.” (Betty, September 13, 2016).</td>
</tr>
</tbody>
</table>

Although the three categories were of similar size with less than 5% of a difference, the largest category was a need for PD at 36%. This category described teachers who recognized a need to deepen their understanding of word study to enhance the program. As outlined in Table 11, Taylor sought additional practice with the program paired with training (Taylor, teacher interview, October 11, 2016), while Marie had some confusion with grading and the levels of student spelling development (Marie, teacher interview, September 16, 2016). The next highest category included teachers, who felt they had received adequate PD (32%), and were able to implement the word study program at a basic level. Tiffany for example described how she took
a class through the school system and had a second grade team member provide support, which enabled her to implement the program (Tiffany, teacher interview, September 19, 2016). Rachel in contrast, self-taught the word study program, relying on word study textbooks for instructions to teach sorts (Rachel, teacher interview October 5, 2016).

Also representing 32% of responses, the third group of teachers viewed their professional development as quality. For these responses, teachers commonly described building knowledge over a longer period of time and often through multiple sources. For example, Tracy’s understanding of word study came from college course, teammate support, and district training (Tracy, teacher interview, September 12, 2016). Similarly, Betty had taken the county provided training, but spoke most highly of her college teacher mentor who scaffolded her understanding of word study instruction and assessment (Betty, teacher interview, September 13, 2016). In terms of quality training, teachers viewed it advantageous to have more localized support from teachers and/or mentors, beyond just college courses or workshop training.

Reviewing the professional development teachers experienced, 28 codes were identified, as some teachers experienced multiple opportunities. The four categories of professional development including county training, college course, team collaboration, and self-taught are displayed by Figure 7 in chart format.
As a countywide initiative, it was logical that county training was the largest category with 12 responses. Referred to as Pathways to Literacy, the school system continuously reinforced the literacy program with workshops on different components, which included word study. Although a countywide focus, only 12 out of 19 teachers (63%) mentioned this professional development, demonstrating that training was not universal across all schools and teachers. Other components were less consistent. Whether undergraduate preparation or optional graduate courses, only six teachers (32%) mentioned this type of word study support. Although less common, this type of professional development would be the most in-depth in terms of material, as a semester-long course requires more reading, class time, and assignments.
than a county workshop. Team collaboration was also only mentioned by six teachers (32%), demonstrating how team dynamics and mentoring support varied between schools.

A final focus regarding teacher preparation was available resources to implement the program. Resources was a broad category left for teacher interpretation in response to the following questions on the fall journal (see Appendix B):

- What resources do you have to teach word study?
- What resources do you still need to teach word study?

Based on teacher responses, Figure 8 illustrates the teachers that had a need for additional resources.

Figure 8

*Fall Journal – Resource Needs*
Analyzing the six responses (32%) representing resource needs, the teachers sought unique materials for their classrooms.

- Marie – additional digital timers
- Brianna – methods to help carry over words after the weekly test
- Tracy – resources for higher students in Syllable Juncture level
- Lucy – activities to reinforce word patterns
- Nancy – games boards and other activities than sorts
- Suzanne – additional word lists

Overall, these six requests sought resources to enhance differentiation and a broader application of learned skills. For more advanced groups, teachers such as Suzanne and Tracy were lacking higher-level materials as teachers excelled and needed further engagement (Suzanne, fall journal, November 7, 2016; Tracy, fall journal, November 2, 2016). Marie and Nancy sought materials for other activities, such as speed sorts (timers) and word pattern games (Marie, fall journal, November 17, 2016; Nancy, fall journal, December 1, 2016). Connecting to a need for transfer of skills, Brianna and Lucy were interested in different approaches to support students (Brianna, fall journal, November 5, 2016; Lucy, fall journal, November 2, 2016). Across all of these requests, teachers were not seeking support in fundamental materials for weekly routines (e.g. sorting envelopes, notebooks, folders) or program knowledge (e.g. textbooks). The requests they sought were beyond basic word study procedures, suggesting teachers were comfortable with their general practices.

**Summary**

Interpreting the experiences of second grade teachers using the word study program includes both textual and structural aspects. The textual description analyzes “what” the
participants experienced teaching word study, while the structural description explains “how” the participants experienced teaching (Moustakas, 1994). These two descriptions are then synthesized to present the “essence” of the overall experience.

The textual description for word study incorporated the methods teachers implemented within the context of their classroom environment. For the NVPS teachers in this study, the key characteristics for teaching effective word study was time management, differentiation of instruction, and student transfer of learned skills. The most pressing issue for teachers was finding methods to fit word study instruction into the demanding school week with many curriculum standards. As classroom teachers were expected to teach multiple subjects (e.g. math, science, social studies) as well as multiple components of language arts (e.g. reading, writing, oral language), setting aside the appropriate time to teach word study was difficult. Teachers that integrated word study into their broader curriculum, as well as collaborated with their grade level team members were the most successful. Regarding differentiation, word study provided opportunities for teachers to adapt instruction to multiple spelling levels within their classrooms. Differentiation was important for schools of all SES levels, because both below grade remediation and above grade level enrichment could be addressed through word study. Teachers that maximized the time of ELL and SPED teachers, as well as parent volunteers were more successful at meeting consistently with multiple word study groups in a classroom. Grade levels that collaborated by sharing students for group instruction more easily provided multiple levels of differentiation, compared to single classroom instruction. Finally, transfer of word study skills was a key goal for teachers and deemed critical by principals. The goal of “skill transfer” was for students to apply learned word study concepts during authentic reading, writing, and content learning opportunities. Skill transfer was enhanced by teachers who
integrated more meaningful weekly activities, using word study patterns during writing workshop conferences, sentence writing activities, word hunts in reading, and authentic formative assessments with multiple objectives (e.g. spelling, sorting, writing).

For the structural experience, this analysis concentrates on the opinions of teachers over course of the semester, needs for implementing word study, and the influence of past experiences on current beliefs. Regarding general opinions on effectiveness, almost all teachers viewed word study as at least “somewhat effective” at the start of the school year. At the mid-point of the school year, positive views increased further, as all teachers viewed some level of effectiveness and over two-thirds of teachers considered word study “effective” to “highly effective” as a program. Although teachers valued the word study program, a broad range of training existed across schools. Although all teachers had basic training and training was mostly consistent within schools, variance existed between schools. Grouping the schools, Dale and Eagle Hill were highly trained, Dover and Harris had adequate training, and Thomas and Newport were minimally trained. Schools with higher levels of training demonstrated increased levels of efficacy using the program and implemented more purposeful and complex activities, compared to the less trained schools that faced more challenges and were less confident in the program.

Regarding past spelling experiences, although many teachers had indifferent to strongly negative memories of spelling, no correlation was identified between childhood spelling experiences and future teacher practices. This lack of connection could have been overcome by teacher training, strong collaboration, and a disconnect between traditional spelling programs and the more recent word study approach.

Presenting the “essence” of spelling instruction combines these two descriptions to summarize the practices and beliefs about word study. In general, teachers who had a more in-
depth professional experience with multiple learning opportunities (e.g. graduate courses, workshops, trainings), had stronger beliefs in the purpose and value of word study instruction. Better trained teachers and teams developed higher quality activities that applied word study concepts in authentic ways. With increased classroom application, teachers observed higher rates of word study transfer, as students used learned concepts during reading and writing. Differentiation was highly valued by teachers, although they recognized the challenges of managing multiple groups and finding the time for instruction. Strong collaboration between teacher teams helped overcome time limitations, in comparison to homeroom teachers who experienced frustration teaching multiple groups alone. Despite difficulties managing time limitations and the needs of multiple groups, the ability to differentiate instruction was highly valued by teachers. Meeting the needs of all students, including remediation and enrichment was of the utmost importance of teachers and motivated their efforts for using word study.

In the concluding chapter five, the findings of the study will be summarized, followed by a discussion of key themes and central elements. Then the implications of the study are addressed in terms of empirical, theoretical, and practical viewpoints. Finally, limitations of the study are described along with recommendations for future research.
CHAPTER FIVE: DISCUSSION, CONCLUSIONS, AND RECOMMENDATIONS

Overview

The purpose of this transcendental phenomenological study was to understand the experience of second grade teachers implementing word study instruction at six elementary schools in Northern Virginia. The six schools represented a range of socioeconomic levels including low SES (Harris and Thomas), middle SES (Dale and Eagle Hill), and high SES (Dover and Newport). All 19 teachers in the study were experienced teachers (one or more years), had some level of word study training (e.g. college course, workshop, training), and taught word study on a consistent basis that school year. Semi-structured interviews, journal entries, classroom observations, post-observation unstructured interviews, and student work artifacts were the five data collection tools for this study. Principal interviews at the six participating schools were also collected to triangulate data from a different source. Data analysis was addressed following the Moustakas’s (1994) transcendental phenomenology model seeking to find the common themes of the shared experience for the phenomenon of teaching word study. The ATLAS.ti program was used to organize primary documents and efficiently code clusters of meaning for theme identification. The chapter begins with summarizing the findings in the context of the five research questions answered and continues with discussion of the findings as they relate to the themes identified, relevant literature, and the three guiding theoretical frameworks. The chapter then discusses the implications of the study, the limitations of the study, and future research recommendations. Chapter 5 then concludes with a summary.

Summary of Findings

This transcendental phenomenological study was guided by the central research question: What are the experiences of second grade elementary teachers implementing word study spelling
instruction in their classrooms? This central question was directed more specifically by five research sub-questions in which this section delineates a concise summary of the findings. The following five research questions informed the study:

1. What are the common word study instructional challenges faced by teachers?

For challenges, three broad themes were determined: (1) Time and program management; (2) Transfer of skills; (3) Differentiation. The leading area of concern was a need for time. The difficulty to find time to teach word study was frequently noted in both teacher interviews (24% of responses) and winter journal entries (31% of responses). Furthermore, 42% of principal responses emphasized lack of teacher instructional time for word study. In the classroom, teachers were struggling to find time during the instructional day to consistently teach word study. The time balance issue was also observed and noted by the school principals. In terms of causes, teachers described large class sizes, multiple spelling groups, and other curriculum demands taking away time. When word study is self-contained in a classroom, teachers had difficulty meeting with multiple groups for appropriate amounts of time and following-up with individual students as needed in classrooms with 20+ students. These difficulties were exasperated in classrooms with wider ranges of skills, such as ELL students at Title I schools with little English knowledge (e.g. Harris and Thomas), and high SES schools with commonly more advanced readers (e.g. Eagle Hill and Newport).

In connection with a need for time, another difficult component of word study for teachers was program management. Scheduling word study and meeting the needs of multiple groups was noted as complex in addition to time consuming for a classroom. Planning and preparing for multiple word study groups with specific needs was difficult for these teachers, evident in teacher interviews (9% of responses) and winter journals (10%). This need was
identified less by principals, only being mentioned in 8% of responses. Considering the similarities between lack of time and program management, these themes can be combined for a more comprehensive view of word study coordination. When grouped, the category of time and program management was considerable for 33% of teacher interviews, 41% of winter journals, and 50% of principal interviews. Managing the program for large classrooms with many student needs, teachers and principals recognized the difficulties presented for implementing word study with fidelity.

The second highest challenge consistent across data points was teachers not observing a transfer of spelling skills. The concern of teachers not seeing the application of learned spelling skills was described in teacher interviews (13% of responses), winter journal entries (17% of responses), and principal interviews (17% of responses). Teachers noted this lack of transfer beyond words study tests in overall written works, specific sentence writing, and reading comprehension. Teachers identified an under usage of learned pattern knowledge spelling words in writing, as well as determining word meaning based on morphemes (meaning units).

A third overarching challenge for teachers implementing word study was differentiation, which was an issue in multiple ways. For students struggling with word study, including deficits in phonological awareness, spelling knowledge and vocabulary skills, remediation and/or intervention is important. For teachers, providing the specified instruction for the necessary amount of time is difficult, representing 9% of teacher interviews, 14% of winter journals, and 14% of principal interviews. Connected to remediation, another differentiation challenge described by teachers was providing extension activities for more advanced spellers. These above-level students required unique academic challenges and support than their grade level peers. Although not a large portion of response, teachers identified advanced instruction for 7%
of teacher interviews and 3% of winter journals. These different challenges were commonly aligned with the unique populations of schools, such as low SES Title I schools and high SES schools. Title I schools such as Harris Elementary struggled with students stagnating and not making appropriate growth, while Eagle Hill teachers had concerns for high-performing students not beginning challenged in word study appropriately. Combining remediation and extension challenges into an over differentiation category, the challenge is more evident with 16% of teacher interviews, 17% of winter journals, and 14% of principal interviews.

2. What instructional methods for word study are successful for teachers?

Regarding successes, many similarities were found between what teachers viewed as challenges and what others considered an area of achievement. These components of word study teachers had success with in previous years and mid-year over the course of the study. Three key themes were identified as successes: (1) Transfer of spelling skills; (2) Differentiation; (3) Spelling and vocabulary growth.

The leading category most strongly referenced by teachers and principals was transfer of spelling skills. Just as this was a concern for some in terms of a challenge, for teachers who observed application of word knowledge applied during reading and writing, this transfer was also a point of accomplishment. This type of success was mentioned in 29% of teacher interviews and 33% of winter journals. In addition, 50% of principal responses mentioned this aspect of word study an area of success. Consistent usage of word knowledge beyond the spelling curriculum and weekly assessments, truly defined growth for many teachers and principals.

The second most common form of word study success was the ability to differentiate instruction. In comparison to traditional methods that were uniform with a single list class wide,
the ability for teachers to meet multiple levels of word study was valued. Differentiation was highlighted by 29% of teacher interviews and increased midyear with 33% of winter journals. This advantage for word study was similarly recognized by principals as 30% of responses fell into this category.

The third most common success category represented the more direct outcome for word study, including spelling growth and vocabulary development. These categories were separated initially, because the skills can be viewed as unique. For example, during teacher interviews, 7% of responses mentioned vocabulary, while a separate 7% describing basic spelling. During winter journals, no teachers mentioned vocabulary, while 14% noted spelling growth. These categories though can be consolidated, because the level of growth is dependent on the developmental stage of the student. A Letter Name speller would be working on spelling patterns, while a Syllable Juncture speller would be concentrating on meaning. Overall, these students fall along the same continuum. Combining these categories reveals the overall emphasis of these successful skills, which included 14% of teacher interviews, 14% of winter journals, and 20% of principal interviews. Although this category was only the third most common response, its purpose was the most clear and direct in terms of growth. Spelling and vocabulary growth can be assessed with weekly word study tests as students spell words, write sentences, and/or complete word definition tasks.

3. How do teachers address their word study instructional challenges?

In terms of overcoming obstacles, three main areas of concern were presented by teachers and administrators: (1) Meeting needs of special populations (e.g. ELL, SPED, at-risk); (2) Managing time and multiple groups effectively; (3) Enhancing transfer of word study skills.
The methods of meeting the needs of ELL, SPED, and at-risk students had many similarities in how teachers provided specialized instruction. In order to meet with multiple groups in a more efficient manner, providing additional instructors is a useful strategy. For ELL and SPED classrooms, case managers and assistants were utilized by teachers to allow multiple groups to be instructed concurrently. Teachers did not separate students based on services, rather homogenously grouped the entire classroom according to word study skills. In addition, teachers also recruited parent volunteers to support when appropriate, such as giving weekly assessments. With this additional support, teachers could meet with groups more efficiently, and meet more frequently or for longer sessions with at-risk students.

Connectedly, managing time and multiple groups was a challenge for many teachers, regardless if they had special populations in their classrooms. Two schools with the highest satisfaction with their program efficiency were Thomas and Eagle Hill. The second grade teams at these schools collaborated to switch students across classrooms for specialized instruction. This team collaboration enabled the grades to provide 5-6 different levels of instruction during the same period of time. Although these schools had distinctly different populations as Thomas was Title I and Eagle Hill had a high SES community, the approach worked effectively in the teacher’s view, demonstrating wide applicability.

Addressing the third obstacle, transfer of skills, teachers described highlighted multiple approaches that were successful. As teachers explained new activities they planned for the year, 50% (9/18) of teachers sought meaningful application of skills and curriculum integration. Enhancing application was evident in classrooms that more broadly integrated word study into their full curriculum. During reading workshop, teachers included word study into their Daily 5 and literacy centers as a component of the larger literacy block. Writing workshop was a main
emphasis, as teachers incorporated word study patterns into writing conferences and editing. Overall, the more word study was integrated seamlessly into the broader curriculum, the more likely the transfer of skills would occur.

4. What do different forms of administrator and student feedback suggest about teachers’ word study instruction?

This research question sought triangulation of data by incorporating observations and student artifacts as different types of data, as well as principal interviews for an additional source. Classroom observations enabled a clear authentic view of classroom instruction, rather than self-reported data from the perspective of teachers. Classroom observations included word sort introductory lessons, classwork activities, and word sort assessments. Principal interviews presented a big-picture view of the school and entire team of teachers, compared to single classroom experiences. During word sort introductory lessons, teachers on teams that switched students between classrooms were efficiently able to teach a single in-depth lesson (Melissa, observation, December 9, 2016; Erika, observation, December 5, 2016), compared to teachers that completed the activity within a single classroom and had to rush to meet with multiple groups (Matt, observation, January 9, 2017). Another teacher had become overwhelmed with mid-year assessments and interruptions, preventing her from meeting with multiple groups and instead chose to teach a whole class lesson on contractions (Kate, observation, October 17, 2016).

For classwork activities, a great variance in terms of types of activities and structure. Certain classroom activities were very basic and traditional simply using word study words, such as coloring rainbow words (Marie, observation, December 15, 2016) and making words from magnetic letters (Brianna, observation, December 15, 2016). Other teachers included multiple
step partner activities (Taylor, observation, January 19, 2017) and student choice menus (Laura, observation artifact, January 20, 2017). In Tina’s classroom, students completed complex meaning and application activities with developmentally scaffolded word study notebooks that challenged an in-depth understanding of word study words (Tina, observation artifact, January 30, 2017). Word study assessment had similar variation of challenge, as some classrooms included very basic spelling and sorting (Donna, observation artifact, December 2, 2016; Lucy, observation artifact, December 16, 2016), while other had more complex multi-faceted in-depth components (Betty, observation, December 9, 2016; Tracy, observation artifact, December 16, 2016). The variation in terms of activities and assessments was dependent on multiple factors, such as team professional development and team collaboration, which will be explored further in the discussion section.

5. How do teacher experience and professional development background influence word study instruction?

Factors that influenced word study instruction were analyzed in connection with professional development and past spelling experiences. For professional development, teachers self-reported their readiness level, based on experience, college courses, county trainings, and self-education (e.g. professional reading). Teacher responses were grouped into three categories: (1) 37% wanted more PD; (2) 32% received adequate PD; (3) 32% received quality PD.

Analyzing responses on training and development, the following schools represented the highest and lowest levels of professional development.

- Highest professional development
  - Dale – all teachers reported quality PD
  - Eagle Hill – 2 quality, 1 adequate, 1 need more PD
- Lowest levels professional development
  - Thomas – all teachers requested additional PD
  - Newport – 2 requested additional, 1 adequate

Connecting feelings of word student effectiveness with levels of professional development, the teachers at Dale Elementary described word study as effective in both teacher interviews (66% of responses) and fall journals (100% of responses), along with all teachers reporting quality levels of preparation (100% of responses). Connectedly, Eagle Hill had similar results for interviews (66%) and winter journals (100%), along with the second highest level of professional development. Further demonstrating a connection between professional development and instructional effectiveness using word study, the lowest levels of efficacy were reported by Newport Elementary as a majority of teacher interviews and journals fell into the “somewhat effective” and “not effective” categories. Newport also had the lowest levels of professional development, aside from Thomas Elementary. Thomas also had lower levels of professional development, yet their word efficacy was strong, which could be attributed to strong team collaboration and sharing students for instruction.

Teacher interviews also sought to understand how teachers personally learned spelling, reflecting on their own student experience in school. In terms of general perspectives, teachers were divided into three categories of responses about their personal spelling experiences: (1) 42% neutral or indifferent experience; (2) 37% negative or difficult experience; (3) 21% positive learning experience. Although the indifferent response was the most common, it could be concerning that only 21% of students viewed positively a critical component of elementary school. Regardless of the instructional program, learning to spell words for written
communication is a basic educational norm. Analyzing this data connected to teacher views on efficacy, schools had a range of experiences on both higher and lower efficacy teacher teams. The wide range of responses across schools and lack of connection to feelings on effectiveness did not suggest a connection between personal experiences and instruction. Teachers did not appear to transfer their negative experiences to the performance of their students. Although it should be noted, that none of the teachers directly experienced word study as students.

**Discussion**

The discussion aligns the research findings with the theoretical frameworks and empirical research that are the foundation of this transcendental phenomenological study. The three identified themes from this study were time and group management, transfer of skills, and professional development. These themes structure the discussion to draw attention to the central elements of the study, which are listed as follows: word study differentiation, remediation and enrichment, grade level collaborative grouping, authentic integration of word study skills, multi-faceted and long-term professional development, and flexible scheduling.

**Time and Group Management**

Time and group management was an area of focus for all teachers with different levels of success. The ability for teachers to be successful regarding time and group management was influenced by their level of training (professional development) and team collaborative structures. This category was a leading challenge described by teachers with two data points (24% interviews and 31% winter journals) and reinforced by principal interviews (42% of interviews). This challenge spanned across school demographics from low SES (Nancy, teacher interview, October 25, 2016; Suzanne, teacher interview, September 19, 2016; Laura, winter journal, February 12, 2017) to high SES (Rachel, teacher interview October 5, 2016; Betty,
The main challenges described by teachers included large class sizes, multiple spelling groups, and schedule interruptions such as required school testing. It was not simply that teachers did not have time to implement word study, rather many felt they were not able to implement word study with complete fidelity to meet the needs of all of their students (Matt, winter journal, February 6, 2017). The determination of effectiveness and lack of time was dependent on the knowledge of the teachers regarding word study as the teachers held themselves to their own expectations. Although somewhat surprising, the level of teacher professional development was not clearly influential, as schools with high levels of training (e.g. Dale and Eagle Hill) or low (e.g. Thomas and Newport) did not report noticeably different perspectives of time management.

Even though time management was a common teacher difficulty, it was a challenge addressed by schools differently. Overcoming time limitations and meeting with multiple groups was addressed most effectively by schools that involved additional teachers (Laura, observation, January 19, 2017; Lucy, observation, December 16, 2016) and trained adults (Tracy, observation, December 12, 2016) to work with groups, as well as grade levels that collaborated to provide services (Eagle Hill and Thomas). Multiple adults were incorporated into the word study schedule by utilizing the following groups:

- Special education teachers
- English language learner teachers
- Parent volunteers

Including SPED and ELL teachers into the classroom schedule was dependent on the class population, because only classrooms with students requiring these accommodations would typically receive these additional services. It is not required though that teachers involve SPED
and ELL teachers in word study, rather it had to be a conscious choice of the general educator. Furthermore, teachers that planned instruction beyond just providing accommodations were empowering SPED and ELL teachers to be co-teachers to all students in the classroom, instead of teaching only designated students (Laura, observation, January 19, 2017; Lucy, observation, December 16, 2016).

For classrooms without SPED or ELL assistance, another avenue was utilizing classroom volunteers to provide certain forms of assistance. Volunteers could be a range of approved positions, such as parents, community helpers, or high school students. As long as volunteers are screened by the school to work with students, teachers could utilize them in specific manners to guide students. Volunteers supplemented the professional instruction of the teacher and maximized the time of the teacher to scaffold student skills. For example, parent volunteers were able to assist with weekly assessments and literacy centers, working with small groups of students (Tracy, observation, December 12, 2016; Lucy, observation, December 16, 2016). Although volunteers needed to be familiar with word study and comprehend the basic components, detailed instructions were provided by the classroom teacher for the volunteers to follow.

The other method to overcome challenges in time and managing multiple groups came from school teams that collaborated to group students across classrooms for targeted instruction. This approach was utilized by Eagle Hill Elementary and Thomas Elementary and included all teachers on both second grade teams. These two teams used similar diagnostic assessments (e.g. *Words Their Way* or *Word Journeys*) for all of their students and then meeting as teams to determine homogenously-skilled groups based on student skills. During agreed upon times during the school week, students switched to go to classrooms for word skill instruction. This
approach enabled grouping based on student levels, while only requiring a minimal amount of
time. For example, a single classroom teacher meeting with 4 groups for 10 minutes sessions
would take approximately 45 minutes in total with transitions. At Eagle Hill Elementary,
students could switch between 6 classrooms for comprehensive 30 minute sessions, taking less
time and providing longer more specified instruction with multiple word study groupings (Erika,
observation, December 5, 2016; Betty, observation, December 9, 2016). Connectedly, teachers
at both Eagle Hill and Thomas Elementary reported the highest program efficiency scores during
teacher interviews and winter journals.

Another advantage of switching between classrooms was enabling differentiation, which
was the third most common challenge expressed by teachers, as well as the second most common
area of success. Teachers expressed concerns regarding differentiation in terms of both their
lower performing students and more advanced students, falling along different ends of the
developmental spelling continuum. Furthermore, principals also emphasized differentiation as
an important area for success (30% responses), recognizing the value of meeting multiple levels
of needs. In general, differentiation was a main advantage of word study that teachers sought
success and they were noticeably concerned when challenges prevented effective
implementation.

It is also important to highlight a unique approach applied by Thomas Elementary to
address time concerns, which resulted in positive teacher responses on word study effectiveness.
Thomas Elementary was a Title I school with a large low-income population, minimal parent
involvement, and many below grade level spelling students. Although this context could be a
source of frustration as students may not be able to receive adequate support at home from
working-class families with potential language barriers, the team at Thomas Elementary sought
to focus solely on in-class support rather than homework to assist development. The teachers at Thomas Elementary extended their word study schedule to two weeks compared to one, allowing for more in class exploration of word patterns to enhance learning (Steve, teacher interview, September 19, 2016). During the first week, teachers introduced words and incorporated basic level skill instruction (e.g. sounds and patterns), shifting to the second week teachers then concentrated on more in-depth understanding (e.g. meaning and application) (Rita, observation, January 30, 2017), working towards a bi-weekly spelling assessment (Taylor, teacher interview, October 11, 2016).

Transfer of Skills

Another common theme that existed for teachers both as a considerable challenge and source of success was the transfer of learned spelling skills to other content areas. Most directly, teachers and administrators saw high importance of usage of learned spelling skills during authentic writing situations (see Table 8 and Table 10). Furthermore, it was important that word study morpheme knowledge could be used to enhance word meaning comprehension during reading. Essentially, teachers sought more than high scores on spelling tests and assignments, rather application of these skills in other areas of a student’s overall literacy. For teachers who viewed transfer as a challenge, it was noted by 13% of teacher interviews, 17% of winter journals and reinforced by 17% of principal responses. Connectedly, this focus on transfer was also viewed by many as a signifier of program success, reported during 29% of teacher interviews, 33% of winter journals, and 50% of principal interviews. Considering the importance of these skills, analyzing the specific teachers and school teams was important to see what characteristics were evident of word study programs reported as more effective.
For teachers who highlighted difficulties in the transfer of skills a common characteristic was a lack of comprehensive application of skills. Word study in these situations represented a classroom activity in which the goal was completing the assigned task to better understand the assigned sort of the week. Word study instruction was not consistently revisited, rather a task to be completed to prepare for the weekly or biweekly spelling tests. Whether indirectly or explicitly stated, a message was communicated that word study was a task to address spelling test performance, rather than an overarching curriculum that can further success in a variety of content areas and enhancing life literacy skills in general.

A common theme across classrooms that reported success with transfer of word study skills was meaningful application of skills into the broader curriculum. Teachers who reported positive transfer results did not teach word study as a separate subject, rather integrated the skills into other academic areas, such as language arts, science, and/or social studies. The characteristic of meaningful word study integration did not define a single strategy, rather multiple approaches that teachers utilized with a similar purpose. Methods of meaningful application included integration into a broader reading workshop structure, such as literacy center rotations (Matt, observation, January 9, 2017) and student activity menus with voice and choice (Laura, observation, January 19, 2017). For writing workshop, teachers incorporated learned spelling patterns into writing conferences and editing practices (Kate, observation, January 17, 2016). In addition, general reference material practice became an avenue word study application, as students researched words using dictionaries and thesauruses (Tina, observation, December 13, 2016).
Professional Development

Another identified factor that influenced word study instruction was level of professional development and training. Even though all teachers had some word study training prior to the study, differences in depth of training and type of training existed. Comparing school teams, the two schools with the highest levels of professional development were Dale Elementary and Eagle Hill elementary. In contrast, the lowest levels of professional development were Thomas Elementary and Newport Elementary. Comparing views of word study effectiveness, Dale and Eagle Hill had strong reports of word study effectiveness during beginning of the study interviews (66% highly positive responses) and end of study winter journals (100% highly positive for both). This is particularly the case for the three teachers at Dale Elementary, who had engaged in word study college courses, workshop training, county training, and team collaborative sharing (Tracy, teacher interview, September 12, 2016; Kate, teacher interview, September 27, 2016; Tina, teacher interview, September 15, 2016). This long-term training, occurring over 10+ years of teaching, was the most extensive and comprehensive compared to all other grade levels in the study. The complexity of practice and positive feelings on efficacy could be connected to this high level of training. In contrast, Newport Elementary had low levels of teacher training, along with teacher views of “somewhat effective” to “not effective” during teacher interviews (Brianna, teacher interview, September 30, 2016; Lucy, teacher interview, October 5, 2016; Rachel, teacher interview, October 5, 2016). This lack of staff knowledge was reinforced by Newport principal Mr. Conner, who considered their greatest challenge as a need for more training to understand the purpose and methods for teaching word study (Conner, principal interview, January 24, 2017). As the teachers of Newport lacked a deeper understanding of word study and the meaning of the activities, they would be logically less
successful than other teacher and lose confidence in the program as a whole. Thomas Elementary also had low levels of professional development (Rita, teacher interview, October 27, 2016; Steve, teacher interview, October 11, 2016; Taylor, teacher interview, October 11, 2016), but their efficacy remained reasonably high (Rita, winter journal, October 12, 2017; Steve, winter journal, February 12, 2017; Taylor, winter journal, February 13, 2017), which can be connected to their strong collaboration to switch students between classrooms for differentiated instruction. Also, they extended their program to a two-week schedule to allow for more instructional time. By sharing the differentiation workload as a grade level and switching on a longer schedule, the Thomas Elementary teachers made the program more manageable, potentially enabling them to overcome lower levels of professional development.

**Implications**

The findings of this transcendental phenomenological study suggest certain implications for the usage of word study instruction within the elementary classroom context. These implications will be addressed through the lens of the empirical, theoretical, and practical viewpoints.

**Empirical**

Based on a review of the literature, a gap existed in the research on teachers implementing word study. Although traditional spelling instruction had been studied in terms of scripted basal formats (Schlagal, 2002) and memory-based word lists (Hanna, Hodges, & Hanna, 1971), little research had explored developmental spelling approaches including *Word Journeys* (Ganske, 2013) and *Words Their Way* (Bear et al., 2011) programs. The prior research had unaddressed questions about why teachers are feeling unprepared for literacy instruction during
collegiate training programs and professional development (Anderson & Standerford, 2012) and why teacher philosophies did not match their classroom practices (McNeill & Kirk, 2014).

Concerning training, the teachers’ lack of confidence and feelings of efficacy could be related to inconsistent professional development experiences. Even though this study took place within a single school system (Norther Virginia Public Schools), a wide range of training existed between schools. Schools such as Newport Elementary had minimal training, as teachers either attended workshops years ago, or self-taught aspects of instruction through professional reading. In contrast, teachers at Dale Elementary had multiple learning opportunities, including college courses, county training, and strong team collaboration sharing resources. Furthermore, these teachers experienced training over a 10-year period, allowing for ongoing application and growth. Even though Newport Elementary had some of the most experienced teachers in the 19-teacher sample, they did not have PD learning opportunities over those years. These results highlighted the need for more comprehensive ongoing professional development delivered in a range of formats, including college classes, district training, professional resources, and time to collaborate.

Data from this study also revealed some of the possible causes behind why teacher philosophies on spelling instruction did not match their practice. When surveyed, teachers had identified the needs for developmental practice with instructionally appropriate materials, yet traditional spelling practices remained (McNeill & Kirk, 2014). Highlighting teacher concerns, the difficulties of time limitations and managing multiple groups made it difficult for teachers to implement word study with fidelity. Elementary schools such as Dover, Harris, Dale, and Newport struggled to meet with multiple groups for introductory lessons and weekly assessments, especially when skills widely varied, including advanced students and below-level
spellers. In contrast, Thomas Elementary and Eagle Hill Elementary had more success with finding time and group management, through collaborative planning and sharing students. The schools that lacked this collaborative approach and kept students within their homeroom for instruction were in the majority (4/6 of classrooms), demonstrating the strong concern for different practices to enhance word study instruction.

**Theoretical**

The theoretical basis of word study instruction includes the inherent importance of developmental teaching that matches the instructional levels of students (Bear & Templeton, 1998; Schlagal, 2002). Modern spelling concentrates on student-centered approaches Anderson & Standerford, 2012) and grouping students with similar needs for targeted lessons (Kelman & Apel, 2004). Research on students with learning disabilities had established the needs for literacy instruction with appropriate accommodations (Sayeski, 2011), but spelling had been limited to traditional memory-based approaches.

This study expanded the knowledge of the elementary school experience of teachers with a broader population of students. For general mainstream classrooms, as well and inclusive classrooms with students required IEP support and ELL assistance, word study provided valuable differentiation. Despite challenges, all teachers recognized the benefits of word study instruction, beginning with mostly positive responses during fall interviews (see Table 3) and winter journals (see Table 5). In terms of closing the gap for students who fall into categories of at-risk, ELL, or SPED, most teachers believed word study was somewhat closing the gap (11%) or actually closing the gap (47%), yet a considerable number of teachers were unsure the achievement gap was being addressed with their practices (42%) (see Table 9).
Analyzing the interviews and journal entries on efficacy, teachers felt confident that word study provided valuable levels of differentiation in the classroom and was a worthwhile approach to spelling. Word study’s impact on student achievement gaps was not as strong, and continued professional development, opportunities for collaboration, and additional teacher support could be a necessity to increase that impact.

**Practical**

The practical implications of this study are aligned with the actions of school leadership at the division and building level, as well as teacher practices. At the division level, school systems like NVPS can make efforts to provide multiple options for professional development and ongoing support. The second grade team at Dale Elementary would serve as an example of the types of training that could be made available for teachers. By providing college courses with graduate credit, teachers could be motivated and incentivized to deepen their understanding of the program and enhance their practices. In addition, school trainings, after-school workshops, and even online professional development would be beneficial to give teachers options for enhancing their craft.

At the building level, school leadership can enable co-teaching opportunities and team collaboration through scheduling. For ELL and SPED inclusive classrooms, providing consistent weekly time for word study support can allow teachers to plan and implement word study instruction. In terms of grade level collaboration, schedules could be aligned for teachers to switch students between classrooms for homogenously grouped instruction. Furthermore, principals could encourage collaborative practices where data and instruction is a shared practice, rather than a profession of distinctly separate classrooms.
For teachers, practices could be enhanced by participating in collaborative team instruction and efforts to integrate word study into the broader curriculum. Although principals can create collaborative opportunities, teachers must be willing to plan and teach together. To enhance transfer, instead of teaching word study as a separate subject, teachers could incorporate it through the week in multiple subject areas, such as reading, writing, and content area instruction. Whether during literacy centers, writing editing, or understanding new science vocabulary, opportunities exist to apply word study concepts for meaningful purposes.

**Summary of Implications**

Comparing the study’s results to the literature review, most results flowed logically from prior research, while some data points were more surprising. Challenges transferring spelling skills and finding time for spelling instruction were aligned with literature, while methods such as guided writing and word study for remediation were surprisingly absent from classrooms.

Developing word knowledge with cross-curricular application was a topic studied through assorted means in past research. Previous research demonstrated the varying performance of memory-based instruction, compared to the meaningful application of skills. (Morris, Blanton, Blanton, Nowacek, & Perney; 1995). The more emphasis teachers placed on memorization, the less long-term retention of word knowledge for students. Furthermore, when teachers emphasized word list approaches rather than context based instruction, students were less successful (Krashen, 1993). Context based approaches were reinforced by this study, as students struggled more with word transfer the less cross-curricular and deeper meaning instruction was provided. On the other hand, the explicit instruction of word study skills remains critical as qualitative word knowledge growth necessitates clearly planned teacher guidance (Henderson, 1981). Previous studies also reinforced teacher viewpoints regarding the concern
for find instructional time to teach word study (Bloodgood & Pacifi, 2004; Phillips-Birdsong, Hufnagel, Hungler, & Lundstrom, 2009). Instructional time was a need not only in the classroom, but also requested for preparation of lessons and materials.

In terms of surprises, the study’s observations and interviews did not identify any usage of guided writing across the sample of teachers, despite NVPS emphasis on literacy differentiation through guided reading and word study. Guided writing had been applied in other school systems (Gibson, 2008) as a focused approach for teachers to work with groups of students with similar writing needs to teach strategies. This method was not observed or mentioned during interviews, despite most teachers incorporating guided reading and reading strategy groups. This characteristic could simply due to limited time and resources for teacher training and development, as word study and reading dominated the curriculum goals of NVPS at that time.

Another unique observation came from the teachers at Eagle Hill Elementary, who scheduled their reading remediation block during word study classwork time. With this approach, all four teachers in the study (Betty, Erika, Marie, and Melissa) scheduled their tiered reading intervention time during word study practice. Using this structure, the lowest level readers missed their word study practice time. Even though Melissa at Eagle Hill consistently sought to make-up missed word study sessions, it was not a regularly planned activity. This contradicted previous research on literacy remediation, which recommended increased explicitness, expanded time for review, and multiple weekly opportunities to practice (Morris, 1999; Wanzek, Vaughn, & Wexler, 2006). Teachers did have reservations about this schedule, revealing that it was not an easy choice, but rather a matter of convenience for them to keep a classroom engaged during small group intervention.
On a broader scale, the research of this study further explored prior concepts and provided more insight to teacher experiences. Results that varied from prior research were on the smaller scale, focused on specific strategies.

**Limitations**

For this study, limitations constitute possible weaknesses in the research, and that are not in the control of the researcher (Simon, 2011). Limitations to this study include the setting, study length, number of schools, and sample size. These limitations may have reduced the ability to generalize results to other geographic locations, community demographics, and student populations. Although the size of the sample was designed to achieve data saturation for a phenomenological study (Creswell, 2013; Moustakas, 1994), the 19-teacher group may not be an authentic representation of second grade teachers for the NVPS system as a whole or other schools nationwide (Kurz, Elliott, Wehby, & Smithson, 2010). Furthermore, generalization could be limited by the single school system in a specific location incorporating the same state standards, NVPS policies, and division resources. The schools participating in the study did represent different socioeconomic levels and the large NVPS system of over 50 schools presented a broad spectrum of school types and community needs for a single division.

The research took place over two marking periods and incorporated teachers with at least one full year of word study instruction. Despite being able to refer to previous years experiences, teachers were not able to reflect on a full school year, and had to respond to interview questions and journal entries mid-year. Based on teacher response though, teachers did not have markedly surprising responses and thoughts the perspectives appeared informed and reflective.
The final limitation was the researcher’s own limited perspective and past experiences that could interfere with objective and unbiased analysis. As described by Moustakas (1994), the influence of a researchers shared experiences with the participants could create bias and preconceived judgements during research. To address this bias, I bracketed my preconceptions through writing an epoche (see Appendix I), stating how my past experiences and beliefs could influence my research. By being more fully aware and stating my professional background and initial beliefs, readers would be able to make judgements about the research with full transparency.

**Recommendations for Future Research**

This transcendental phenomenological study contributes to the literature on second grade teacher word study instruction in the public school setting. Since the study concentrated on only the second grade level, further research could explore other elementary grades such pre K-to-first and third-to-fifth. Continuing into the middle school level, more advanced morpheme study analyzing word meaning and vocabulary would also be beneficial. Also, additional geographic locations and types of school systems could be studied. This study took place in Northern Virginia with a very large school division. Studies exploring how word study as implemented in different states with unique state standards would be beneficial. Virginia is not a Common Core Curriculum State and instead uses state-specific standards of learning, so exploring Common Core literacy implementation would be unique. Also, determining the impact of division level decisions and resources, a smaller school system would be easier to examine the direct impact on central office decisions.

Research could also explore how different approaches to professional development influenced instruction long term. Perhaps through comparing different schools or school systems
in different stages of spelling training, the impact on practices could be examined to see how
graduate courses, online training, school based workshops, textbook resources and combinations
of multiple options impacted classroom practice.

Finally, exploring different teacher practices in terms of collaborations or variations on
the word study schedule could be informative. Research could further compare the differences
between schools that conducted word study only in individual classrooms compared to team
collaboration sharing students. Also, unique scheduling comparing common weekly word study
scheduling compared to longer two-week planning could be compared to see the growth of
students and efficacy of teachers.

Summary

This study aimed to understand the experience of second grade teacher implementing
word study instruction in a diverse large school system in Northern Virginia. The central
questions focused on challenges, successes, and factors that influenced word study instruction.
After an 18-week period of data collection, despite differences between schools and teachers, the
following themes were evident from analysis:

- Teachers valued the ability to differentiate word study content to the instructional
  levels of students, where students can appropriately learn.

- Teachers had difficulties finding the time daily and weekly to implement quality
  words study instruction to the needs of students.

- Although differentiation provided the opportunity remediation and enrichment for
  phonics, spelling and vocabulary, it also was difficult for individual classroom
  teachers to manage multiple groups.
• Transfer of word study skills to other areas of literacy, such as written work and reading vocabulary, was both an area of instructional difficulty as well as area representing student success. Whether successful or unsuccessful, transfer of word study skills was an area of importance for teachers.

• The depth and breadth of word study professional development varied between teams of teachers at different schools. Certain teams had basic level training for a general understanding of program elements and strategies. Other teams had multi-faceted training in different formats, occurring over multiple years of instruction.

• Teacher teams with more extensive professional development demonstrated increased efficacy teaching word study. Teachers with minimal training often faced more challenges and were less satisfied with their program.

Responding to these themes, the following practices made noticeable impact on the word study program success and provide guidance on further research:

• Teams that shared students across classrooms with homogenously skilled groupings were able to provide a wide level of differentiation with less weekly time requirements.

• Teams that extended word study schedules longer than a week (e.g. 2 weeks) were better able to meet their own expectations managing time requirements and saw enhanced student growth through classwork activities.

• Teachers who integrated word study instruction into other areas of the curriculum experienced higher levels of word study transfer, compared to classrooms that taught word study as a distinctly different subject.
• Teachers that continued professional learning about word study either independently, as part of a team, or as a schoolwide initiative, were more satisfied with their word study program.

• Comprehensive training that incorporates multiple formats such as graduate courses, county workshops, and professional resources were more impactful to enhance instruction than just a single format.

• In depth training occurred over longer periods, across multiple years of teaching are also more beneficial. This approach involves continuously learning with application, rather than limited teacher training sessions.

Based on these implications, school systems have worthwhile opportunities to enhance word study instruction by supporting team collaboration and providing quality professional development. This study included a broad spectrum of teachers from schools with different needs, yet the overall support for word study was highly consistent. Even though word study had been adopted by NVPS for over 10 years, teachers had not grown dissatisfied, or felt the need to find a different program. Based on this strong interest, school leaders need to make an investment in the development of teachers to prepare them with the knowledge and resources to utilize word study. Despite constantly multitasking and working tirelessly for their students, these teachers were seeking further training. This interest in improving their craft for the benefit of students should be cherished and addressed by division leadership. Furthermore, school systems must enable teachers to effectively collaborate, because learning outcomes are better achieved by teams compared to individuals. Working together, through differentiation across classrooms and coteaching situations, can improve differentiation and overcome time limitations. Instruction can be enhanced for students, individualized to their zones of proximal development,
through multiple trained educators working together. Teachers have the motivation, interest, and ability to provide high-quality word study instruction, if the proper environments, resources, and support are provided for success.

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doi: 10.1111/bjdp.12000


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APPENDIX A: INTERVIEW QUESTIONS

When interviewing teachers about the experience teaching word study, the following interview protocol adapted from Creswell (2013) was utilized.

<table>
<thead>
<tr>
<th>Classroom Interview Questions Protocol</th>
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<td>Time of interview:</td>
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<td>School:</td>
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<td>Interviewer:</td>
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<td>Interviewee:</td>
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<td>Position of interviewer:</td>
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<td>Description of interview setting:</td>
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<tr>
<td>Questions:</td>
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<tr>
<td>1. What was your experience learning spelling as a child?</td>
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</table>
2. Why do you use word study in your second grade classroom?

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3. What has been your experience teaching word study?

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4. How effective do you feel word study is for your students?
   (Brownell, Lauterbach, Dingle, Boardman, Urbach, & Park, 2013; Piasta, Connor, Fishman, & Morrison, 2009)

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a. What do you consider your biggest success teaching word study?
b. What do you consider your greatest challenge teaching word study?

5. Did you use a different spelling program in the past?
(Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014)

   a. If yes,
      i. How would you compare that program to word study?
      ii. Was it difficult changing to a new program?
      iii. What is your preference?
b. If no,
   i. Are you satisfied with the word study program? Why or why not?
   ii. Are you interested in trying other programs? Why or why not?

6. Do you feel adequately prepared to lead word study instruction in your classroom?
   (Allington, 2002; Carreker, Joshi, & Boulware-Gooden, 2010)
   a. If yes: What training, coursework, and/or experience helped prepare you?
   b. If no: Do you feel you need additional training to adequately teach word study?
7. **How do you assess your word study program?**

   **a. When do you assess your students (e.g. weekly, quarterly, and/or yearly)?**
   (Sayeski, 2011; Schlagal, 2002; Wright, 2000)

   b. **How do you use diagnostic, formative, and summative assessments?**
   (Bear et al., 2011; Ganske, 2013; Templeton & Bear, 1992)

8. **How does your word study program change over time?**
   (Nelson, 1989; Masterson and Apel, 2010)

   **a. Progression over the course of the year**
b. Connection to prior grade

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c. Continuation to grade next year

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9. How do you apply the word study program with the individual students in your classroom? (Anderson & Standerford, 2012; Bear & Templeton, 1998; Henderson, 1990; Kelman & Apel, 2004; Morris, 1999; Sayeski, 2011)

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a. At-risk students
b. Special education

   
   
   
   
   
   
   

   c. English language learners

   
   
   
   
   
   

10. Is there anything else you would like to mention about teaching word study in your second grade classroom?

   
   
   
   
   
   
   

11. Do you have any questions for me?
APPENDIX B: JOURNAL QUESTIONS

Teachers responded in writing to reflective prompts to help understand the challenges, successes, and strategies of teachers. Writing was completed through an online database, allowing flexibility for teachers to complete responses in school or at home. Teachers responded during a window of time at the start of the school year (October/November) and the end of the second marking period (February).

<table>
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<th>Fall Journaling Questions (October/November)</th>
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<td><strong>Date:</strong> __________________________________</td>
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<td><strong>Name:</strong> __________________________________</td>
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<td><strong>School:</strong> ______________________________</td>
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<tr>
<td><strong>Grade:</strong> ___________  <strong>Number of students:</strong> __________________</td>
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</table>

**Questions:**

1. What goals do you have for your word study program this year?
2. How do you plan and prepare to teach word study?
3. What resources do you have to teach word study?
4. What resources do you still need to teach word study?
5. What are your expectations for word study in terms of your students' spelling abilities and their familiarity with the program?
6. What new ideas, activities, and methods will you be incorporating this year for word study?
Winter Journaling Questions (February)

Date: __________________________________________

Name: __________________________________________

School: __________________________________________

Grade: ___________ Number of students: ________________

Questions:

1. What progress has your class made toward your word study goals?

2. What challenges have you faced so far this year?

3. What successes have you experienced so far this year?

4. What changes have you made to the program so far this year?

5. How have your students matched or differed from your expectations regarding their word study abilities?

6. Are you satisfied with your current word study program?
   a. If yes, why are you satisfied?
   b. If no, what changes do you plan to make and what do you need to do to make those changes?
APPENDIX C: OBSERVATION NOTES

Observation Notes Procedures

Observation notes were collected during the literacy instructional block scheduled daily for each teacher. Observations were scheduled with the teachers in advance. Observations occurred during the following lessons:

1. Word study instruction
2. Classwork activities
3. Word sort assessment

Observational notes were recorded using an observation protocol compiled from multiple existing studies. The general structure was adapted from the Classroom Observation Protocol (Creswell, 2013), including descriptive and reflective notes and a map or photo of the classroom. Based on the form designed by Dunnick (2013), time stamp notes were recorded every 10-15 minutes to create a consistent ongoing description in chronological order. To provide consistency across observations, specific “Look-Fors” with a checklist format and space for examples are incorporated, which was based on the Student Engagement Observation and Reflection Tool (College of William and Mary, SCHEV, & VDOE, 2012).

The protocol addressed the specific research questions and the overall research purpose of the study. In addition, characteristics of word study activity were studied in each observation, such as the number of groups, group sizes, and word study skills taught, which are foundational aspects of the Word Journeys (Ganske, 2013) and Words Their Way (Bear et al., 2011) programs. The protocol “Look-Fors” also included noted aspects of effective word study instruction (Graves, 2006), such as

- Contextual and definitional instruction
- Discussions of word meaning
- Word taught in multiple contexts
- Deep and active processing of words

Overall, the observation protocol served to describe the physical environment and action of the classrooms, along with reflective notes that provide moment-by-moment thoughts. As described by Sanjek (1990), these notes provided preliminary analysis based on immediate insight during the observation.
Central Question: How do second grade elementary teachers describe their experience implementing word study spelling instruction in their classrooms?

Sub-questions:

a) What are the common word study instructional challenges faced by teachers?
b) What instructional methods for word study are successful for teachers?
c) How do teachers address their word study instructional challenges?
d) What do different forms of administrator and student feedback suggest about teachers’ word study instruction?
e) How do teacher experience and professional development background influence word study instruction?

| School: ___________________________ Teacher: ___________________________ Date: ________
| Class type: ______________________ Classroom number: ________
| Start time: ___________ End time: _______________ Length of activity: _____________
| Activity name: ___________________________ Grade level: _____________
| Activity description:
| _____________________________________________
| _____________________________________________
| _____________________________________________
| _____________________________________________
| _____________________________________________
| _____________________________________________
| _____________________________________________

Description of Classroom Population

Students: _____________ Teachers: _____________ Other adults: _____________

Description of ethnic diversity: _____________________________________________

________________________________________________________________________
Description of language diversity:

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<th>Description</th>
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<tr>
<td>Observation “Look-Fors”</td>
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<td>Classroom Characteristics</td>
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<tr>
<td>Multiple sorting groups</td>
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<td>Established classroom routines</td>
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<td>Word study classwork</td>
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<td>Homework connection</td>
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<td>Classroom volunteers</td>
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<td>Teacher Characteristics</td>
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<td>Teacher modeling of skill</td>
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<td>Contextual and definitional instruction</td>
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<td>Scaffolded support</td>
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<td>Formative assessment</td>
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<td>Summative assessment</td>
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<td>Student Characteristics</td>
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<td>Active engagement with words</td>
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<td>Deep processing with words</td>
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<td>Student discussion of word meaning</td>
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<td>Explore words in different contexts</td>
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<td>Independent student work</td>
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<td>Partner and/or group activity</td>
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<td>Student word study notebooks</td>
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<td>Student word study envelopes</td>
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<td>Skill application to reading &amp; writing</td>
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Page 3/5
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<th>Time: ______</th>
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<td>Word Study Information</td>
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<td><strong>Groups and group size:</strong></td>
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| **Word study sorts:** |  |
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Description of Classroom Layout:

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SKETCH OF CLASSROOM

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APPENDIX D: CONSENT FORMS

TEACHER CONSENT FORM
You are invited to be in a research study of developmental spelling instruction at the elementary school level. You were selected as a possible participant because of your current practices as a teacher and the permission of your central administration office and school principal. I ask that you read this form and ask any questions you may have before agreeing to be in the study.

Gregory S. Mihalik, a doctoral candidate in the School of Education at Liberty University, is conducting this study.

**Background Information:** The purpose of this study is to describe the experiences of second grade general education teachers integrating word study spelling programs within their language arts framework. Phenomenological research will seek to describe how teachers can promote cross-curricular spelling growth and identify common instructional challenges and solutions.

**What you will do in the study:** Teachers in the study will take part in interviews, observations, and journaling to develop a comprehensive description of the word study instructional experience. The study will include the following steps for teachers:

1) Semi-structured interviews – The first data point will be 20-30 minute sit-down interviews to describe word study philosophy. Interviews will be audio-recorded and include open and direct questions to elicit detailed responses.

2) Journaling – The second data point will be teacher written responses recorded through an online database. Teachers will journal about their spelling philosophies, based on experience, training, and coursework. Teachers will write two to three paragraph responses during a window of time at the start of the school year and the end of the second marking period.

3) Observations – Each teacher will have a single classroom observation (30-45 minutes), providing authentic insight into word study practices. Observations will be conducted
following a protocol to provide a level of consistency to the process, while incorporating descriptive and reflective components.

4) Unstructured interviews – Before and after observations, these interviews will provide accompanying data at a convenient time. Intending to be brief reflective conversations, interviews will only be 5-10 minutes in length and include 3-5 questions.

5) Student work artifacts – Upon each observation, artifacts of student work will be sought to highlight key points from observations and interviews.

**Time required:** The study will require about 5–6 hours of time over the course of a full school year.

**Risks:** As an observational study without experimental control, no major risks are involved. Confidentiality will be maintained to prevent private information from participant interviews being shared publicly.

**Benefits:** The study may help researchers better understand word study instruction at the elementary level and enable teachers to improve their practice from the feedback.

**Confidentiality:** The records of this study will be kept private. The names of teachers, administrators, and students will be kept confidential. In addition, the names of the school system, specific schools and the general location will be changed to pseudonyms. Research records will be stored securely and only the researcher will have access to the records.

**Voluntary participation:** Participation in the study is completely voluntary. Your decision whether or not to participate will not affect your current or future relations with Liberty University or Northern Virginia Public Schools. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

**Right to withdraw from the study:** Participants have the right to withdraw from the study at any time without penalty. All audio recordings and written responses will be destroyed should you decide to withdraw. No penalty will be issued to participants for withdrawing.
Contacts and Questions: The researcher conducting this study is Mr. Gregory S Mihalik. You may ask any questions you have now. If you have questions later, you are encouraged to contact him at the following:

Gregory Mihalik  
Home Address  
City, State, ZIP Code  
Telephone: (XXX) XXX-XXXX  
Email: gmihalik@liberty.edu

Also, you are able to contact the research chair with questions and/or concerns at the following:

Dr. Meredith J. Park  
Liberty University – School of Education  
Telephone: (XXX) XXX-XXXX  
Email: mjpark@liberty.edu

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, you are encouraged to contact the Institutional Review Board, 1971 University Blvd, Carter 134, Lynchburg, VA 24515 or email at irb@liberty.edu.

Please notify the researcher if you would like a copy of this information to keep for your records.

Statement of Consent: I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.

(NOTE: DO NOT AGREE TO PARTICIPATE UNLESS IRB APPROVAL INFORMATION WITH CURRENT DATES HAS BEEN ADDED TO THIS DOCUMENT.)

☐ The researcher has my permission to audio-record and/or photograph me as part of my participation in this study.

Signature:_________________________ Date: ______________

Signature of Investigator: ______________________ Date: ______________
You are invited to be in a research study of developmental spelling instruction at the elementary school level. You were selected as a possible participant because of the differentiated spelling programs utilized at your school. This study is seeking evidence-based spelling instruction for observational research to learn from teachers’ practices. I ask that you read this form and ask any question you may have before agreeing to in the study.

Gregory S. Mihalik, a doctoral candidate in the School of Education at Liberty University, is conducting this study.

**Background Information:** The purpose of this study is to describe the experiences of second grade general education teachers integrating word study spelling programs within their language arts framework. Phenomenological research will seek to describe how teachers can promote cross-curricular spelling growth and identify common instructional challenges and solutions.

**What you will do in the study:** Administrators in the study will take part in semi-structured and unstructured interviews to develop a comprehensive description of the word study instructional experience. The study will include the following steps for administrators:

1) Semi-structured interviews – The first data point will be 20-30 minute sit-down interviews to describe word study philosophy. Interviews will be audio-recorded and include open and direct questions to elicit detailed responses.

2) Unstructured interviews – During observational visits, unstructured interviews will provide accompanying data at a convenient time. Intending to be brief reflective conversations, interviews will only be 5-10 minutes in length and include 3-5 questions.

3) Interviews will be recorded and transcribed for qualitative analysis.
**Time required:** The study will require about 2-3 hours of administrator time over the course of a school year. Formal interviews will be an hour in length, while informal meetings will be 30 minutes or less.

**Risks:** As an observational study without experimental control, no major risks are involved. Confidentiality will be maintained to prevent private information from participant interviews being shared publically.

**Benefits:** There are no direct benefits for participating in this research study. The study may help researchers better understand word study instruction at the elementary level and enable teachers to improve their practice from the feedback.

**Confidentiality:** The records of this study will be kept private. The names of teachers, administrators, and students will be kept confidential. In addition, the names of the school system, specific schools and the general location will be changed to pseudonyms. Research records will be stored securely and only the researcher will have access to the records.

**Voluntary participation:** Participation in the study is completely voluntary. Your decision whether or not to participate will not affect your current or future relations with Liberty University or Northern Virginia Public Schools. If you decide to participate, you are free to not answer any question or withdraw at any time without affecting those relationships.

**Right to withdraw from the study:** Participants have the right to withdraw from the study at any time without penalty. All audio recordings and written responses will be destroyed should you decide to withdraw. No penalty will be issued to participants for withdrawing. If you choose to withdraw, please contact the researcher at the address, phone number, or email address included in the next section.

**Contacts and Questions:** The researcher conducting this study is Mr. Gregory S Mihalik. You may ask any questions you have now. If you have questions later, you are encouraged to contact him at the following:

Gregory Mihalik  
Home Address  
City, State, ZIP Code  
Telephone: (XXX) XXX-XXXX  
Email: gmihalik@liberty.edu
Also, you are able to contact the research chair with questions and/or concerns at the following:

Dr. Meredith J. Park  
Liberty University – School of Education  
Telephone: (XXX) XXX-XXXX  
Email: mjpark@liberty.edu

If you have any questions or concerns regarding this study and would like to talk to someone other than the researcher, **you are encouraged** to contact the Institutional Review Board, 1971 University Blvd, Carter 134, Lynchburg, VA 24515 or email at irb@liberty.edu.

*Please notify the researcher if you would like a copy of this information to keep for your records.*

**Statement of Consent:** I have read and understood the above information. I have asked questions and have received answers. I consent to participate in the study.

(Note: Do not agree to participate unless IRB approval information with current dates has been added to this document.)

☐ The researcher has my permission to audio-record and/or photograph me as part of my participation in this study.

Signature:__________________________________________________ Date: _____________

Signature of Investigator: _____________________________________ Date: ______________
APPENDIX E: IRB APPLICATION

IRB Application #_________   ____________

1. APPLICATION INSTRUCTIONS:
   a. Complete each section of this form.
   b. Email it and any accompanying materials (i.e., recruitment letters, consent forms, instruments, and permission letters) to irb@liberty.edu.
   c. Please note; we can only accept our forms in Microsoft Word format; we cannot adequately review applications and supporting documents submitted as PDFs, Google docs, or in html format. *See signature pages and permission letter exceptions below in item f.
   d. Please submit one signed copy of the fourth page of the protocol form, which is the Investigator’s Agreement.
   e. If you intend to use LU students, staff, or faculty as participants or LU students, staff, or faculty data in your study, you will need to have the appropriate department chair/dean sign page two below.
   f. *Signed pages 2 and 4, proprietary documents, and permission letters can be submitted by email (attached, scanned document or PDF) to irb@liberty.edu; by fax to 434-522-0506; or by mail, and campus mail, 1971 University Blvd. Lynchburg, VA 24515; or hand delivery to 701 Thomas Road Campus, Carter Building, Rm. 134.
   g. Electronic signatures are acceptable for pages 2 and 4 if a time and date stamp is included. If you choose to sign electronically, be careful not to convert the entire IRB application to a PDF.
   h. Please be sure to use the grey form fields to complete this document; do not remove any information/sections or change the format of the application. Use the tab key to move from one form field to the next.
   i. Applications with the following problems will be returned immediately for revisions: 1) Grammar/spelling/punctuation errors, 2) A lack of professionalism (lack of consistency /clarity) on the application itself or any supporting documents, or 3) Incomplete applications. Failure to minimize these errors will delay the review and approval process.

2. BASIC PROTOCOL INFORMATION:

Study/Thesis/Dissertation Title: Teacher Experiences in Elementary Word Study Instruction: A Phenomenological Study

Principal Investigator (PI): Mr. Gregory Mihalik

Professional Title (i.e., student, teacher, principal, professor, etc.): Division Instructional Facilitator, Doctoral Student Researcher
School/Department (i.e., School of Education, LUCOM, etc.): **School of Education**

Personal Mailing Address: **Home Address City, State, ZIP Code**

Telephone: **XXX-XXX-XXXX**
LU Email: **gmihalik@liberty.edu**

Check all that apply: 
- ☐ Faculty
- ☑ Graduate Student
- ☐ Undergraduate Student
- ☐ Staff

This research is for: 
- ☐ Class Project
- ☐ Master’s Thesis
- ☑ Doctoral Dissertation
- ☐ Faculty Research
- ☐ Other (describe):

If applicable, have you defended and passed your dissertation proposal? 
- ☐ Yes
- ☑ No

If no, what is your defense date? **06/07/2016**

Co-Researcher(s): **None**

School/Department(s):

Telephone(s): 
LU/Other Email(s):

Faculty Advisor/Chair/Mentor: **Dr. Meredith J. Park**

School/Department: **Liberty University – School of Education**

Telephone: **XXX-XXX-XXXX**
LU Email: **mjpark@liberty.edu**

Non-key Personnel (i.e., reader, assistant, etc.): **Dr. Lori Riley**

School/Department: **Retired Literacy Supervisor – Northern Virginia Public Schools**

Telephone: **XXX-XXX-XXXX**
Email: **Email Address**

Content Consultant: **Dr. Melissa Lannom**

School/Department: **Liberty University – School of Education**

Telephone: **XXX-XXX-XXXX**
LU Email: **mhlannom@liberty.edu**

Research Consultant: **Dr. Russell Yocum**

School/Department: **Liberty University – School of Education**

Telephone: **XXX-XXX-XXXX**
LU Email: **ryocum@liberty.edu**
**Liberty University Participants:**
Do you intend to use LU students, staff, or faculty as participants or LU student, staff, or faculty data in your study? If yes, please list the department and/or classes you hope to enlist, and the number of participants/data sets you would like to enroll/use. If you do not intend to use LU participants in your study, please select “no” and proceed to the section titled “Funding Source.”

☑️ No ☐ Yes

Number of participants/data sets

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<th>Department</th>
<th>Class(es)/Year</th>
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In order to process your request to use LU participants, we must ensure that you have contacted the appropriate department and gained permission to collect data/include their students. Please obtain the original signature of the department chair in order to verify this.

Name of Department Chair/Dean

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<th>Signature of Department Chair/Dean</th>
<th>Date</th>
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**Funding Source:** If research is funded, please provide the following:

Grant Name (or name of the funding source): N/A

Funding Period (month/year): N/A

Grant Number: N/A

Anticipated start and completion dates for collecting and analyzing data: 06/1/16 – 04/1/17

Completion of required CITI research ethics training course(s): Yes (Fall 2015)

**Education**

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<th>Course Name(s) (School of Education, Psychology/Counseling, etc.)</th>
<th>Date</th>
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3. OTHER STUDY MATERIALS AND CONSIDERATIONS:

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<tr>
<th>Use of voice, video, digital, or image recordings?</th>
<th>☑ Yes ☐ No</th>
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<td>Participant compensation?</td>
<td>☑ Yes ☐ No</td>
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<td>Advertising for participants?</td>
<td>☑ Yes ☐ No</td>
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<td>More than minimal psychological stress?</td>
<td>☑ Yes ☐ No</td>
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<tr>
<td>Confidential material (questionnaires, surveys, interviews, test scores, photos, etc.)?</td>
<td>☑ Yes ☐ No</td>
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<td>Question</td>
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<td>Extra costs to the participants (tests, hospitalization, etc.)?</td>
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<td>The inclusion of pregnant women?</td>
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<td>More than minimal risk? *</td>
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<td>Alcohol consumption?</td>
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<td>Waiver of Informed Consent?</td>
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<td>The use of protected health information obtained from healthcare</td>
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<td>practitioners or institutions?</td>
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<td>VO2 Max Exercise?</td>
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<td>The use of blood?</td>
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<td>Total amount of blood</td>
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<td>Blood draws over time period (days)</td>
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<td>The use of rDNA or Biohazardous materials?</td>
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<td>The use of human tissue or cell lines?</td>
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<td>The use of other fluids that could mask the presence of blood</td>
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<td>(including urine and feces)?</td>
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<td>The use of an Investigational New Drug (IND) or an Approved Drug for</td>
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<td>an Unapproved Use?</td>
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<td>The use of an Investigational Medical Device or an Approved Medical</td>
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<td>Device for an Unapproved Use?</td>
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<td>The use of Radiation or Radioisotopes?</td>
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*Minimal risk is defined as “the probability and magnitude of harm or discomfort anticipated in the research are not greater in and of themselves than those ordinarily encountered in daily life or during the performance of routine physical or psychological examinations or tests.” [45 CFR 46.102(i)]

4. **INVESTIGATOR AGREEMENT & SIGNATURE PAGE** (Stand-alone signature pages are available at [http://www.liberty.edu/academics/graduate/irb/index.cfm?PID=20088](http://www.liberty.edu/academics/graduate/irb/index.cfm?PID=20088))

BY SIGNING THIS DOCUMENT, THE INVESTIGATOR AGREES:

1. That no participants will be recruited or entered under the protocol until the PI has received the final approval or exemption email from the chair of the Institutional Review Board.
2. That no participants will be recruited or entered under the protocol until all key personnel for the project have been properly educated on the protocol for the study.
3. That any modifications of the protocol or consent form will not be initiated without prior written approval, by email, from the IRB and the faculty advisor, except when necessary to eliminate immediate hazards to the participants.
4. The PI agrees to carry out the protocol as stated in the approved application: all participants will be recruited and consented as stated in the protocol approved or exempted by the IRB. If written consent is required, all participants will be consented by signing a copy of the approved consent form.

5. That any unanticipated problems involving risks to participants or others participating in the approved protocol, which must be in accordance with the Liberty Way (and/or the Honor Code) and the Confidentiality Statement, will be promptly reported in writing to the IRB.

6. That the IRB office will be notified within 30 days of a change in the PI for the study.

7. That the IRB office will be notified within 30 days of the completion of this study.

8. That the PI will inform the IRB and complete all necessary reports should he/she terminate University association.

9. To maintain records and keep informed consent documents for three years after completion of the project, even if the PI terminates association with the University.

10. That he/she has access to copies of 45 CFR 46 and the Belmont Report.

Gregory S. Mihalik
Principal Investigator (Printed) Principal Investigator (Signature) Date

FOR STUDENT PROPOSALS ONLY

BY SIGNING THIS DOCUMENT, THE FACULTY ADVISOR AGREES:

1. To assume responsibility for the oversight of the student’s current investigation as outlined in the approved IRB application.

2. To work with the investigator and the Institutional Review Board, as needed, in maintaining compliance with this agreement.

3. To monitor email contact between the Institutional Review Board and principle investigator. Faculty advisors are cc’d on all IRB emails to PIs.

4. That the principal investigator is qualified to perform this study.

5. That by signing this document you verify you have carefully read this application and approve of the procedures described herein, and also verify that the application complies with all instructions listed above. If you have any questions, please contact our office (irb@liberty.edu).

Dr. Meredith J. Park
Faculty Advisor (Printed) Faculty Advisor (Original Signature) Date

*The Institutional Review Board reserves the right to terminate this study at any time if, in its opinion, (1) the risks of further experimentation are prohibitive, or (2) the above agreement is breached.

5. **PURPOSE:**
   a. **Purpose of the Research:** Write an original, brief, non-technical description of the purpose of your project. Include in your description your research hypothesis or
question, a narrative that explains the major constructs of your study, and how the
data will advance your research hypothesis or question. This section should be easy
to read for someone not familiar with your academic discipline.

The purpose of this phenomenological study is to describe the
experience of integrating word study spelling programs for 10-15
second grade teachers across six elementary schools in northern
Virginia. Phenomenological research will seek to describe how
teachers promote spelling development and identify their common
instructional challenges and solutions. At this stage in the research,
spelling development will be defined as the phonics, spelling, and
vocabulary growth of students, reinforced by their weekly differentiated
word study instruction.

The theory guiding this study is the developmental spelling approach
(Bear & Templeton, 1998), which describes that students progress along
a continuum of spelling knowledge progressing from basic alphabet
knowledge to identifying spelling patterns and finally more advanced
vocabulary awareness. More specifically, this study will concentrate on
the stages of spelling development outlined by Ganske (2013), which
can be determined through diagnostic spelling assessments. My study
will address teacher implementation of word study based on past
research showing continued teacher reliance on ineffective traditional
spelling programs (Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014)
and the importance of teacher philosophy when attempting to alter
teaching practices (Brownell, Lauterbach, Dingle, Boardman, Urbach, &
Park, 2013).

The central research question is as follows: What are the experiences of
second grade elementary teachers implementing word study spelling
instruction in their classrooms?

The connected sub-questions include: (a) What are the common word
study instructional challenges faced by teachers? (b) What
instructional methods for word study are successful for teachers? (c)
How do teachers address their word study instructional challenges? (d)
What do different forms of administrator and student feedback suggest
about teachers’ word study instruction?

6. PARTICIPANT INCLUSION/EXCLUSION CRITERIA:
   a. Population: From or about whom will the data be collected? Address each area in
      non-scientific language. Enter N/A where appropriate.
      i. Provide the inclusion criteria for the participant population—gender, age
         range, ethnic background, health status, occupation, employer, and any
         other applicable information—and provide a rationale for targeting this
         population. If you are related to any or all of your participants, please
         explain.
Gender – N/A; Age range – 21+ years; Ethnic background – N/A; Health status – N/A; Occupation – Elementary school teachers and administrators; Employer – Northern Virginia Public Schools; Prior training – Word study spelling program; Additional criteria – Public school employees, licensed teachers and administrators, second grade teachers, and elementary school principals

ii. Who will be excluded from your study (e.g., persons under 18 years of age):
All students, part-time teachers, non-licensed teachers, persons under 18 years of age

iii. Explain the rationale for the involvement of any special population (e.g., children, specific focus on ethnic populations, mentally disabled, lower socio-economic status, prisoners). N/A

iv. Provide the maximum number of participants you plan to enroll from all participant populations and justify the sample size. You will not be approved to enroll a number greater than the number you list. If, at a later time, it becomes apparent you need to increase your sample size, you will need to submit a change in protocol form and await emailed approval of your requested change before recruiting additional participants.

20 second grade teachers and 6 administrators will provide range of educational settings, because teachers will be recruited from 6 different schools with varying socioeconomic levels.

v. For NIH, federal, or state-funded protocols only: Researchers sometimes believe their particular project is not appropriate for certain types of participants. These may include, for example: women, minorities, and children. If you believe your project should not include one or more of these groups, please provide your justification for their exclusion. Your justification will be reviewed according to the applicable NIH, federal, or state guidelines. N/A

b. Types of Participants: Only check the boxes for those participants who will be the focus of your study. You do not need to check the boxes for individuals who may be coincidental to your study.

- [x] Normal Volunteers (Age 18-65)
- [ ] Minors (under age 18)
- [x] Over age 65
- [ ] University Students
- [x] Active-Duty Military Personnel
- [x] Discharged/Retired Military Personnel
- [ ] Institutional Individuals
- [ ] Pregnant Women
- [ ] Fetuses
- [ ] Cognitively Disabled
- [ ] Physically Disabled
- [ ] Participants Incapable
- [ ] Prisoners or
7. RECRUITMENT OF PARTICIPANTS:
   a. **Contacting Participants**: Describe in detail how you will contact participants regarding this study.
      Participants will be contacted through initially reaching out to principals, which will lead to recruiting teachers. The purposive sample will be recruited through the following steps:
      1) Initial interest survey for principals;
      2) Two schools selected at random from groupings representing urban, suburban, and rural communities (six totals);
      3) Second grade teachers will be recruited through email to join study, explaining benefits and requirements of participation;
      4) Only full-time, certified, general education teachers selected;
      5) All teachers must be trained in word study and implementing the program.

      *Please submit as separate Word documents to irb@liberty.edu with this application one copy of all letters, emails, flyers, advertisements, or social media posts you plan to use to recruit participants for your study. If you will contact participants verbally, please provide a script that outlines what you plan to say to potential participants.

   b. **Location of Recruitment**: Describe the location, setting, and timing of recruitment.
      Northern Virginia Public Schools, referred to as NVPS, will be the district participating in the study. Six elementary schools will be involved in the study representing suburban, urban, and rural areas in the county. Teachers will be recruited during the Fall 2016 school year in order to have consistent data with multiple contexts. Meetings and observations will take place in the home school of each teacher. In the event the school is closed for a proposed meeting (e.g. interview), an agreed upon location will be selected with a private area for discussion.

      NVPS requires IRB approval as part of any research application. Due to this requirement, a conditional approval letter from Liberty University will be submitted in the school system research application. Following NVPS approval, the application will be resubmitted to Liberty for complete approval.
Screening Procedures: Describe any screening procedures you will use when recruiting your participant population (i.e., screening survey, database query, etc.).

Teachers will be recruited through outreach to elementary principals in the school system to gauge their level of interest. Study cannot be conducted without principal permission and administration support. Principals will complete and submit interest survey, signifying their willingness to participate.

Teachers will then be contacted by email and asked to join the study. The requirements, benefits, and risks will be specifically outlined to potential participants. Only full-time, certified, general education teachers with support from their building principal will be selected for the study. Schools will be selected to represent three different socioeconomic backgrounds (e.g., low-, mid-, high-). The study will focus on second grade teachers to provide consistency for comparison of classroom experiences. Participants must consistently teach reading/language arts to their students, including word study instruction. In addition, teachers must have prior training in word study to participate.

c. Relationships: Does the researcher have a position of grading or professional authority over the participants (e.g., the researcher is the participants’ teacher or principal)? If a position of authority exists, what safeguards are in place to reduce the likelihood of compromising the integrity of the research (e.g., addressing the conflicts in the consent process and/or emphasizing the pre-existing relationship will not be impacted by participation in the research, etc.)?

No. The researcher is not in a position of authority over the participants, but rather serves as a peer being a classroom teacher. The researcher does serve in a literacy facilitator position, which includes presenting word study programs to groups of teachers, but does not have any evaluative authority. In order to protect the reputations of teachers being observed and interviewed, all teacher names will be pseudonyms and kept confidential.

8. RESEARCH PROCEDURES:
   a. *Description of the Research:* Write an original, non-technical, step-by-step (1, 2, 3, 4.) description of what your participants will be required to do during your study and data collection process, including information about how long each procedure should take.

Data collection will begin in the summer (July 2016) prior to the start of the 2016-2017 school year and conclude at the end of the second marking period (January 2017). Multiple forms of data will be collected, outlined in the following list.
1. Semi-structured interviews (July/August) – The first data point will be sit-down interviews to describe word study philosophy. This will take place over the summer, which is the most convenient period for teachers. Time: Approximately 30-40 minutes.

2. Journaling (September/October) – The second data point will be teacher written responses, outlining initial word study practices to start the year. Time: Approximately 20-30 minutes.

3. Observations (October – January) – Each teacher will have a single classroom observation, providing authentic insight into word study practices. The window is lengthy (four months) due to the challenge of coordinating numerous observations at different school sites over the course of a school year. Time: Approximately 35-45 minutes.

4. Unstructured interviews (October – January) – Before and after observations, these interviews will provide accompanying data at a convenient time. Time: Approximately 10-15 minutes.

5. Student work artifacts (October – January) – Upon each observation, artifacts of student work will be sought to highlight key points from observations and interviews. Time: None.

6. Journaling (January/February) – The second journal entry will be the concluding views of each teacher, which will highlight change over time teaching word study. Time: Approximately 20-30 minutes.

The range of sources will incorporate data from teachers, administrators, and students (artifacts), which will seek to present multiple perspectives to fully describe the experience.

*Please submit as separate Word documents to irb@liberty.edu with this application one copy of all instruments, surveys, interview questions or outlines, observation checklists, etc.

b. **Location of the Study:** Please describe the location in which the study will be conducted. Be specific; include city, state, school/district, clinic, etc.

**Northern Virginia Public Schools,** contains over 55 elementary schools and represents a broad landscape of communities with urban, suburban, and rural sectors. The ethnic diversity of the student population includes 53% White, 18% Asian, 16% Hispanic, and 7% Black (data collected from school system website in June 2015). Elementary schools include grades kindergarten through fifth grade, along with additional programs warranted to educate English language learners, students with special needs, and preschool students.

Participants will be chosen from six specific elementary schools in Northern Virginia, representing different socioeconomic status levels. For example, some schools in NVPS are classified as Title I and receive federal support based on high percentages of low-income families. In contrast, certain other schools bring students from gated country clubs.
with only high-income families. This spectrum of SES levels presents a unique opportunity for this regional study to represent a range of participants.

9. DATA ANALYSIS:
   a. Estimated number of participants to be enrolled or data sets collected: 20 teachers and 6 administrators

   b. Analysis Method(s): Describe how the data will be analyzed and what will be done with the data and the resulting analysis, including any plans for future publication or presentation.

   The following data analysis steps are based on the seven steps of phenomenological analysis outlined by Moustakas (1994).

   1. Description of Personal Experiences – Also known as the epoche, this reflective process states the background and professional experience of the author. The purpose of the epoche is for the researcher to “set aside prejudgments, biases, and preconceived ideas” (Moustakas, 1994, p. 59).

   2. Horizontalization of the Data – Careful review will be conducted for the collected data to identify significant statements. This process, called horizontalization, highlights the important quotes from the transcript that represent the meaning of the experience.

   3. Clustering and Thematizing – During clustering, significant statements are reviewed across participant data to identify commonalities in experience. The commonalities are reviewed altogether to code summative themes.

   4. Identify Invariants Constituents and Themes by Application – Themes will be finalized as each invariant constituent and associated theme is reviewed for each individual participant interview. The themes will then be reviewed with the data as a whole to evaluate their representativeness of the larger sample of teachers.

   5. Textual Description of the Experience – This interpretation includes a textual description analyzing “what” the participants experienced. The textual description includes what methods the teachers used when implementing word study and the learning outcomes for students.

   6. Structural Description of the Experience – This interpretation includes a structural description about “how” the phenomenon was experienced. The structural description moves beyond observation and rather seeks to outline the thoughts and emotions of the experience (Moustakas, 1994).

   7. Presentation of the “Essence” of the Experience – This analysis incorporates the structural and textual descriptions into a combined summary of the phenomenon. The “essence” includes statements that are universally shared, which are identified through the reports of multiple individuals.
Ongoing Data Analysis Procedures Ongoing during the data collection process, I will be memoing to document my evolving research theories.

10. PARENTAL/GUARDIAN CONSENT:
   a. Does your study require parental/guardian consent? (If your intended participants are under 18, parental/guardian consent is required in most cases.)
      i. [ ] Yes
      ii. [x] No
   b. Does your study entail greater than minimal risk without potential for participant benefit?
      i. [ ] Yes (If so, consent of both parents is required.)
      ii. [x] No

11. ASSENT FROM CHILDREN:
   a. Is assent required for your study? Assent is required unless the child is not capable (age, psychological state, sedation), or the research holds out the prospect of direct benefit that is only available within the context of the research. If the parental consent process (full or part) is waived (see #14 below), assent may be also. See our website for this information.
      i. [ ] Yes
      ii. [x] No

12. PROCESS OF OBTAINING INFORMED CONSENT:
   a. Consent Procedures: Describe in detail how and when you will obtain consent from participants and/or parents/guardians and, if applicable, child assent.
      Following principal approval and initial interest presented by teachers in a chosen school, the recruitment script will be read to all potential participants in a face-to-face meeting. The informed consent form to volunteer for the study will be provided while the recruitment script is administered and completed informed consent forms will be collected immediately following any questions potential participants may have about the study. Meetings will be held over June-July 2016 on separate dates at each school based on availability of potential participants.

      Parent/guardian consent will not be required for student artifacts as students will not be a focus of the study. Student work will not incorporate any pictures or videos, and will only be used to complement teacher interviews and/or observations. In addition, artifacts will not include any student names or identifiers.

13. *DECEPTION:
   a. Are there any aspects of the study kept secret from the participants (e.g. the full purpose of the study)?
1. If yes, describe the deception involved and the planned debriefing procedures. Attach a post-experiment debriefing statement and consent form offering participants the option of having the data destroyed:

b. Is any deception used in the study procedures?
   i. No
   ii. Yes
      1. If yes, describe the deception involved and the planned debriefing procedures.

*Attach a post-experiment debriefing statement and consent form offering participants the option of having the data destroyed. A debriefing template is available on our website.

14. WAIVER OR MODIFICATION FOR REQUIRED ELEMENTS IN INFORMED CONSENT PROCESS:
   a. A waiver or modification of some or all of the required elements of informed consent is sometimes used in research involving deception, the use of archival data, and other minimal risk studies. If requesting a waiver or modification of consent, please address the following:
      i. Does the research pose no more than minimal risk to participants (i.e., no more risk than the risk involved in everyday activities)? N/A and
      ii. Will the waiver have no adverse effects on participants’ rights and welfare? N/A and
      iii. Would the research be impracticable without the waiver?
         1. Yes
            a. Please explain.
         2. No
   iv. and Will participant debriefing occur (i.e., Will the true purpose and/or deceptive procedures used in the study be reported to participants at a later date)?
      1. Yes
      2. No

15. WAIVER OF SIGNED INFORMED CONSENT DOCUMENT:
   a. A waiver of signed consent is sometimes used in anonymous surveys or research involving secondary data. This does not eliminate the need for a consent document, but it does eliminate the need for a signature(s). If you are requesting a waiver of signed consent, please address the following (yes or no):
      i. Would the signed consent form be the only record linking the participant and the research? N/A and
      ii. Does a breach of confidentiality constitute the principal risk to participants? N/A or
iii. Does the research pose no more than minimal risk to participants (i.e., no more risk than everyday activities)? N/A and
iv. Does the research exclude any activities that would require signed consent in a non-research context? N/A
v. Will you provide the participants with a written statement about the research (i.e., an information sheet that contains all the elements of the consent form but without the signature lines)? N/A

16. CHECKLIST OF INFORMED CONSENT/ASSENT:

17. PARTICIPANT PRIVACY AND CONFIDENTIALITY:
   a. Privacy: Privacy refers to persons and their interest in controlling access to their information. Describe what steps you will take to protect the privacy of your participants (e.g., If you plan to interview participants, will you conduct your interviews in a setting where others cannot easily overhear?).

   Interviews will be conducted in teacher classrooms and administrator offices to keep discussions private. If classrooms are unavailable, quiet private areas will be utilized that is agreed upon by the participant and researcher.

   Pseudonyms will be applied to the transcribed face-to-face interviews, observations, and student work artifacts. Copies of student work will be utilized for analysis and will be retained indefinitely. Student work names and/or other identifiers will be removed from documents.

   The data may be used for future research projects, but no identifying data will be used in any publication, product, or future research that may extend from this study.

   b. Confidentiality: Confidentiality refers to agreements with the participant about how data are to be handled.
      i. How will you keep your data secure (i.e., password protection, locked filing cabinet, etc.)?
         All retained data for transcription, analysis, and coding will be password protected on an electronic database (Liberty Office 365 OneDrive account). All paper document, such as student artifacts will be securely locked in a personal filing cabinet.
Recorded interviews will be erased after transcriptions are produced. Transcriptions with non-identifying data/psyeudonyms may be retained indefinitely.

ii. Who will have access to the data?  
   Researcher and members of the dissertation committee.

iii. *Will you destroy the data once the three-year retention period required by the federal regulations expires?  
   1. □ Yes  
   a. How will the data be destroyed?  
   2. ☒ No

*Please note that all research-related data must be stored for a minimum of three years after the end date of the study, as required by federal regulations.

c. Is all or part of the data archival (i.e., previously collected for another purpose)?  
   i. ☒ Yes (“No” response is included below. Please skip to c.ii if your response is “No.”)  
      1. Is the archival data publicly accessible?  
         a. □ Yes  
            i. Please provide the location of the publicly accessible data (website, etc.).  
         b. ☒ No  
            i. *Please describe how you will obtain access to this data. Student work artifacts will be gathered through teacher permission to support interviews and observations. All student work will be anonymous and solely concentrate on word study instructional concepts.

   2. Will you receive the data stripped of identifying information, including names, postal addresses, telephone numbers, email addresses, social security numbers, medical record numbers, birth dates, etc.?  
      a. ☒ Yes  
         Please describe who will link and/or strip the data. Please note that this person should have regular access to the data and he or she should be a neutral third party not involved in the study. Student artifacts will be provided by teachers with student names removed. Artifacts will be copies to allow teachers or students to retain the original documents.
b. □ No
   i. If no, please describe what data will remain identifiable and why this information will not be removed.

3. Can the names of the participants be deduced from the data set?
   a. □ Yes
      i. Please describe.
   b. ☒ No
      i. Initial the following: I will not attempt to deduce the identity of the participants in this study: GM

- Please provide the list of data fields you intend to use for your analysis and/or provide the original instruments used in the study.
  o Interviews – Classroom Interview Questions Protocol
  o Teacher Journaling – Fall and Winter Journaling Questions
  o Classroom Observation – Classroom Observation Protocol

*If the archival data is not publically available, please submit proof of permission to access the data (i.e., school district research officer letter or email). If you will receive the data stripped of identifiers, this should be stated in the letter or email.

ii. ☒ No (Please complete the following questions concerning non-archival data.)

d. If you are using non-archival data, is the non-archival data you will collect anonymous? (i.e., Data do not contain identifying information including names, postal addresses, telephone numbers, email addresses, social security numbers, medical record numbers, birth dates, etc. and cannot be linked to identifying information by use of pseudonyms, codes, or other means.) If you are audio or video recording or photographing participants, your data is not considered anonymous.
   i. □ Yes
      1. Describe the process you will use to collect the data to ensure that it is anonymous.
   ii. ☒ No
      1. Can the names of the participants be deduced from the non-archival data?
         a. ☒ Yes
            i. Please describe:
               Yes. Teacher interviews, journaling, and observations will be associated initially with
the participants names. When data is transcribed, names will be removed and replaced with pseudonyms.

b.  □ No
i. If you agree to the following, please type your initials. I will not attempt to deduce the identity of the participants in the study:

2. Please describe the process you will use to collect the data and to ensure the confidentiality of the participants (i.e., You may know who participated, but participant identities will not be disclosed.). If you plan to maintain a list or codebook linking pseudonyms or codes to participant identities, include this information and verify that the list or codebook will be kept secure and separate from the data by stating where it will be kept and who will have access to the data and list or codebook.

A master list of names and pseudonyms will be utilized during analysis and stored in a locked filing cabinet. Prior to publication, the master list will be destroyed through paper shredding.

iii.  □ N/A (Non-archival data will not be utilized.)

*If you plan to use participant data such as photos, recordings, videos, drawings, etc. for presentations beyond data analysis for the research study (e.g., classroom presentations, library archive, or conference presentations), you will need to provide a materials release form to the participant.

e. Media Use:
ii. Will your participants be audio recorded? □ Yes □ No

iii. Will your participants be video recorded? □ Yes □ No

iv. Will your participants be photographed?  □ Yes □ No

1. *If you answered yes to any of the above, and a participant withdraws from your study, how will you withdraw their recording or photograph?

Audio recording will be erased/deleted permanently following transcription.

*Please add the heading How to Withdraw from the Study on the informed consent document and include a description of the removal procedures.

v. Will your participants be audio recorded, video recorded, or photographed without their knowledge?
1. □ Yes
   a. *Describe the deception and the debriefing procedures.

   *Attach a post-experiment debriefing statement and a post-deception consent form, offering participants the option of having their tape/photograph destroyed.

2. ☑ No

18. PARTICIPANT COMPENSATION:
   a. *Describe any compensation participants will receive. None

   * Research compensation exceeding $600 per participant within a one-year period is considered income and will need to be filed on the participants’ income tax returns. If your study is grant funded, Liberty Universities’ Business Office policies might affect how you compensate participants. Please contact the IRB for information on who to contact for guidance on this matter.

19. PARTICIPANT RISKS AND BENEFITS:
   a. Risks:
      i. Describe the risks to participants and steps that will be taken to minimize those risks. Risks can be physical, psychological, economic, social, or legal. If the only potential risk is a breach in confidentiality if the data is lost or stolen, please state this fact here.

      Risk one: As the study takes place in elementary schools and is connected to instruction, a risk is raised that the process of research could negatively influence student learning. This could occur if the students feel influenced during classroom observations and/or the teacher performs different due to being involved in the study. To minimize risks the researcher will serve as a nonobtrusive observer, through taking notes and not interfering with the activities of the classroom. Regarding the teachers, early conversations will reinforce the informational goal of the study, rather than evaluative to reduce anxiety.

      Risk two: A breach in confidentiality would be a risk for administrators and teachers regarding their professional reputation in public. The teacher interviews and observations could be damaging to the administrator and teacher reputations if the local communities identify specific professionals. By utilizing pseudonyms and securing all data through password protection and locked files, confidentiality will be maintained.
ii. Will alternative procedures or treatments that might be advantageous to the participants be made available?
   1. □ Yes
      a. Please describe the alternative procedures.
   2. ☑ No

iii. Describe provisions for ensuring necessary medical or professional intervention in the event of adverse effects to participants. Examples include the proximity of the research location to medical facilities and your ability to provide counseling referrals in the event of emotional distress. N/A

b. Benefits:
   i. Describe the possible direct benefits to the participants. If participants are not expected to receive direct benefits, please state so. Participants should not expect to receive a direct benefit from completing a survey or participating in an interview.
      No direct benefits.
   ii. Describe the possible benefits to society.
      As an informational study about the word study program, multiple societal benefits are possible: Greater understanding of teacher experience could influence school based decisions to provide proper time, resources, and support needed for word study success. Furthermore, increased understanding of word study practices in the classroom can be used to improve instruction by identifying flaws and build upon effective practices.

c. Investigator's evaluation of the risk-benefit ratio: Please explain why you believe this study is worth doing even with any identified risks.
   The risks outlined for teachers, administrators and students are minimal, because experimental control over instruction in not occurring, rather nonintrusive observation. The study will aim to not influence or change any of the current practices for teachers. The benefits in contrast can occur in many areas be providing more information about word study to guide administrator and teacher practices, which can lead to increased student achievement.
APPENDIX F: NVPS RESEARCH PERMISSION FORM

[Insert Date]

Northern Virginia Public Schools Research Office
Street Address
City, State, ZIP Code

Dear NVPS Research Office:

As a graduate student in the School of Education at Liberty University, I am conducting research as part of the requirements for a doctoral degree (Ed.D). The title of my research project is *Teacher Experiences in Elementary Word Study Instruction: A Phenomenological Study* and the purpose of my research is to describe the experience of integrating word study spelling programs for second grade teachers across multiple elementary schools.

I am writing to request your permission to conduct my research in Northern Virginia Public Schools. In addition to this permission letter, I have also completed the NVPS research application.

Concentrating on the instructional use of word study, teachers will be asked to participate in interviews, complete brief surveys, and allow for a classroom observation.

Teachers participating in the study will require approximately 5–6 hours of time over the course of the school year. The study will begin with an initial interview in the summer of 2016 and participation will conclude at the end of the second marking period in January 2017.

The data will be used to comprehensively understand the experience of teachers using word study, including their challenges and successes in the classroom. Participants will be presented with informed consent information prior to participating. Taking part in this study is completely voluntary, and participants are welcome to discontinue participation at any time.

Thank you for considering my request. If you choose to grant permission, please provide a signed statement on approved letterhead indicating your approval.

Sincerely,

Gregory Mihalik, M.Ed., Ed.S., NBCT
Liberty University Doctoral Candidate
Elementary Instructional Facilitator
Northern Virginia Public Schools
Title: Teacher Experiences in Elementary Word Study Instruction: A Phenomenological Study
Investigator: Gregory S. Mihalik

Dear <<insert name>>:

I am writing to let you know about an opportunity to participate in a research study about the experiences of second grade teachers integrating word study spelling programs within their language arts framework. This study will seek to describe how teachers can promote cross-curricular spelling growth and identify common instructional challenges and solutions.

This study is being conducted by Gregory S. Mihalik, a doctoral candidate in the School of Education at Liberty University, and elementary instructional facilitator for Northern Virginia Public Schools.

Participants will be asked to take part in brief interviews, complete two journal entries, and be informally observed teaching a word study lesson. It should take approximately 5-6 total hours over the course of the fall 2016 semester (5½ months). Your name will be requested as part of your participation, but the information will remain confidential.
If interested in potentially participating in this study, please reply to this email for additional information. Agreement to be contacted or a request for more information does not obligate you to participate in any study. Thank you again for considering this research opportunity.

Sincerely,

______________________________
Gregory Mihalik, M.Ed., Ed.S., NBCT
Elementary Instructional Facilitator
Department of Instruction
Northern Virginia Public Schools
Northern Virginia Public Schools

Application to Conduct Research

Name: Gregory S. Mihalik
Position: Elementary Instructional Facilitator

Location: Department of Instruction
Date: July 2016

1) Study Title: Teacher Experiences in Elementary Word study Instruction: A Phenomenological Study

2) Purpose of Study, with emphasis on benefits to NVPS

The purpose of this phenomenological study is to describe the experience of integrating word study spelling programs for 10-15 second grade teachers across six elementary schools in NVPS. Phenomenological research will seek to describe how teachers promote spelling development and identify their common instructional challenges and solutions. At this stage in the research, spelling development will be defined as the phonics, spelling, and vocabulary growth of students, reinforced by their weekly differentiated word study instruction.

The significance of this phenomenological study lies in the need for the educational community to understand the experience of elementary teachers using word study. Studying teachers’ opinions and practices can potentially explain why outdated spelling methods are currently used by many teachers (Covault, 2011; Fresch, 2003; McNeill & Kirk, 2014) and understand the unpreparedness many teachers feel about literacy instruction (Carreker, Joshi, & Boulware-Gooden, 2010). The analysis of the thought process and background of teachers can be
very insightful, considering how the literacy content knowledge of teachers facilitates their selection and interpretation of spelling words, assessments, and instructional techniques (Moats, 1994; Spear-Swerling, 2009). By allowing the voices of teachers to be heard, teachers can avoid pedagogical obstacles through awareness, rather than making corrections following mistakes. Furthermore, by listening to the thoughts and perspectives of teachers, NVPS can take actions to shift the dynamics that discourage word study practices. This could include enhancing alignment of professional development and instructional resources to meet the needs of teachers implementing word study.

Word study provides a method for improving morphological awareness (Cordewener, Bosman, & Verhoeven, 2015; Hilte & Reitsma, 2011), while addressing the qualitative stages of spelling development (Masterson & Apel, 2010). By improving spelling and vocabulary instruction through differentiated practices such as word study, student achievement can be promoted for all students in NVPS. Word study reaches across language arts subjects, including reading, writing, spelling and oral language as students build their phonological, morphographic, and orthographic knowledge. Through this phenomenological study, the experience of teachers can be better understood to support teachers as they transition from ineffective traditional spelling instruction to research-based developmental word study instruction.

3) Research design

The phenomenological approach will be used to study the common experiences of elementary teachers using word study developmental spelling instruction. Phenomenology is an approach to human science research that focuses on the description of experiences, while avoiding explanation and analysis (Moustakas, 1994). Rather than interpretation,
phenomenology seeks to describe experiences as a whole with vivid and accurate detail. Across multiple subjects, phenomenology describes the authentic experiences in a real world context, providing clarity to everyday living (Moustakas, 1994).

The study will be exploratory to determine obstacles and successes during word study instruction, instead of predetermined research goals. Phenomenological research is a valid approach to find meaningful themes across traditionally self-contained classrooms, especially considering the experiential nature of teaching and learning (Van Manen, 1990). Phenomenological studies are relevant in the education research field (Tesch, 1988), because teachers and students often share school experiences, despite differences in locations and resources. By interviewing teachers and enabling them to share their experiences, the NVPS education community can learn from one another and determine the best practices for spelling instruction (Moustakas, 1994).

4) Subjects/participants, number and selection method

A sample of 15-20 second grade teachers will be selected across six elementary schools. The initial sample will seek 15-20 teachers with the awareness that attrition may lead to a final group of 10-15, which is an appropriate sample size to meet data saturation for phenomenological research (Creswell, 2013; Polkinghorne, 1989). In addition to the schools selected, the sample will also be purposive as described by Lincoln and Guba (1985), by focusing on participants sharing a specific phenomenon. The goal will be to recruit teachers who share a similar word study teaching experience.

The purposive sample will be recruited through the following process: (a) Schools will be selected following an initial interest survey distributed to elementary school principals in NVPS.
The responding schools will be divided into three groupings based on SES levels (low SES/urban, middle SES/rural, high SES/suburban) of the local community; (b) Two schools will be selected at random from each grouping, representing the different communities (six schools total). School sampling seeks to present a more diverse student population; (c) Second grade teachers will be recruited for participation. Grade level consistency enables more direct comparisons of teaching experiences; (d) Only full-time, certified, general education teachers with support from their building principal will be selected for the study; (e) All teachers must be implementing the word study program at the time of the study and have completed some type of formal word study training. Acceptable word study trainings will include required NVPS teacher training programs, NVPS evening optional courses, or graduate courses.

5) **Instruments**

As a qualitative study, inductive inquiry will be utilized to obtain knowledge about the phenomenon. Considering inductive analysis does not involve direct empirical observation, trustworthiness is important during data collection to support findings. To promote trustworthiness, triangulation will be implemented, which involves collecting data from multiple sources to avoid the potential subjectivity of a single viewpoint (Patton, 2001). Interviews with teachers will be the central form of data collection, but findings will also be triangulated through multiple data collection strategies and sources (Creswell, 2013; Patton, 1990). The different strategies will include interviews, observations, artifact analysis, and journaling. These strategies will be scheduled at different times of the 2016-2017 study to provide a comprehensive exploration of the instructional process over time, observing how teachers plan and adapt their instruction based on the changing context.
• Semi-structured interviews (July/August) – The first data point will be sit-down interviews to describe word study philosophy. This will take place over the summer, which is the most convenient period for teachers.

• Journaling (September/October and January/February) – The second data point will be teacher written responses, outlining initial word study practices to start the year. The second journal entry will be the concluding views of each teacher, which will highlight change over time teaching word study.

• Observations (October – January) – Each teacher will have a single classroom observation, providing authentic insight into word study practices. The window is lengthy (four months) due to the challenge of coordinating numerous observations at different school sites over the course of a school year.

• Unstructured interviews (October – January) – Before and after observations, these interviews will provide accompanying data at a convenient time.

• Student work artifacts (October – January) – Upon each observation, artifacts of student work will be sought to highlight key points from observations and interviews.

The range of sources will incorporate data from teachers, administrators, and students, which will seek to present multiple perspectives to fully describe the experience.

6) Procedures, including impact on instructional or staff time

To conduct this phenomenological study, multiple steps will be undertaken prior to data collection. This includes acquiring Institutional Review Board (IRB) approval, eliciting participants, utilizing safe and effective data collection procedures, and implementing appropriate data analysis. Following approval of the research consultant and the dissertation
committee, the research proposal will be submitted to the Liberty University IRB. Only following IRB approval will data collection begin. Participant recruitment will occur through requests presented to teachers who have completed word study training programs. This will create consistency in background experience for participants. Teachers will be contacted through emails and in-person requests at teacher meetings (e.g. trainings and workshops). A formal request letter will be provided to all interested parties, explaining the purpose, time requirements, and participant safeguards for the study.

Data will be recorded through multiple methods based on the collection format. Interviews will be audio-recorded with two devices, protecting against technical difficulties. The audio recordings will be transcribed along with body language notes taken during the interview. Teacher journaling will be collected electronically, through a Google documents program, providing participants with a convenient method of private response.

In terms of interrupting instructional time, this study will not interfere with any student learning opportunities. Observations will be conducted as a nonintrusive observer, aiming to observe without interrupting the normal activities of the classroom. Semi-structured interviews and journal entries will take place outside of school hours and kept to minimal time requirements (30 minutes or less). The time of professional educators will be held in high regard, attempting to minimize the work required by teachers for their involvement.

7) Confidentiality and anonymity statements
Information about teacher instructional methods will be kept anonymous to prevent negative judgments of teachers in the public arena (Creswell, 2012). The physical data will be stored in locked box in a secure location, while electronic data will be double-password protected on an electronic database. This confidentiality is critical, because if teachers fear sharing their true experience teaching word study, the data will lack validity when describing the phenomenon. No identifying information will be kept for any students.

8) Length of Study/Timeline

The study will be conducted over an 18-week period (two marking periods) to observe long-term growth for students and gain an understanding of teacher experience. Teachers will be initially contacted and recruited in the summer of 2016 and followed over the first two marking periods of the school year. The length of data collection is also chosen based on feasibility to work with up to 20 teachers. Furthermore, by having a multiple month data collection widow, the impact on teachers will be less concentrated.

9) Data Analysis

Data analysis will be conducted following the approach of Moustakas (1994), which includes studying data to identify its structure, meaning configuration, and the clustering of themes to develop broader understandings. The seven–step process can lead to a deeper understanding of the essence of the word study instructional program demonstrated across school systems and classroom contexts. The seven steps include: (1) Description of personal experiences; (2) Horizontalization of the data; (3) Clustering and thematizing; (4) Identify invariants constituents and themes by application; (5) Textual description of the experience; (6)
Structural description of the experience; (7) Presentation of the “essence” of the experience. These steps will both reflectively analyze the researcher, as well as draw meaningful connections across multiple complex data sources.

10) Proposed communication of results

Following data analysis, but prior to publication, member checking will occur to enable teacher and principal input. Member checking will allow participants to review their involvement in the study to verify the accuracy of interviews and observations. Working closely with participants will avoid misrepresentation of the participants’ experience. Following final publication through Liberty University, all participants will be granted access to the full dissertation transcript, including the implications of the findings for the word study program in NVPS. Based on the findings, presentations will be made available to the teachers through the reading department (e.g. language arts share fair) and/or professional development courses.

11) Potential for publication

The initial publication of the findings will occur through Liberty University following a dissertation defense. Utilizing the findings, potential journal articles may be written to submit to established publications such as the Greater Washington Reading Council (GWRC) journal and the Virginia State Reading Association (VSRA) journal. For all publication opportunities, full credit and gratitude will be given to NVPS for supporting the research study.
REFERENCES


APPENDIX I: EPOCHE

As the researcher conducting this study, it is important that I address my presuppositions in order to approach my research objectively. My graduate studies and professional experience are directly connected to my topic of study and will be explained in full. Furthermore, the school system being researched in this study is also my currently employer, warranting an explanation of my work experience.

My initial introduction to word study began my first year of teaching in 2005, when I began teaching in a first grade classroom. I was provided with the *Word Journeys* and *Words Their Way* textbooks, along with the mentorship of a 30-year veteran teacher on my grade level. Following a semester of trial-and-error teaching spelling, I enrolled in a reading specialist graduate program through the University of Virginia, which included a course in word study. Over an intense 3-credit course, I learned the philosophy and methods behind word study, as well as connections to a broader reading workshop structure. Upon completion of my graduate program in reading, I then served on a curriculum committee that developed countywide professional development plans for teachers in word study. Based on committee recommendations, I then led trainings in word study, developing presentations and classroom resources to assist elementary teachers with the program. Over a five-year period, I conducted school-day workshops for teachers K-5 as part of a district required literacy training program. I also taught semesterly optional workshops for staff interested in learning about the word study program.

Concurrently during this time, I served as a classroom teacher, working in first grade (three years), fourth grade (five years) and second grade (three years). As part of a balanced literacy framework, I incorporated word study, aligned with the specific needs of my students as
well as the state standards for the grade level. Furthermore, I continued my own professional
development, completing my Education Specialist degree though the University of Virginia in
Education Leadership and Supervision, as well as my National Boards for Professional Teaching
Standards license in the Early-Childhood Generalist field. As part of these certification
programs, I incorporated my work as a word study literacy facilitator to demonstrate my
education leadership and curriculum development abilities.

My experience utilizing word study in the classroom has framed my viewpoint on the
program as a beneficial tool to enhance students' phonological awareness, alphabetic knowledge,
spelling skills, and vocabulary development. The classrooms I have taught over the years have
included students with special needs as well as English language learners, who benefited from
the differentiated approach of word study to meet their unique instructional levels. I have seen
growth in students spelling and vocabulary in the context of specific word study activities, as
well as the transfer of skills during writing instruction (e.g. writing workshop). When designing
professional development, I used my experience to provide support that meets the authentic
needs of complex classrooms, rather than controlled environments often described by
commercial programs.

Entering into my twelfth year as an educator, I stepped into a new role as an elementary
instructional facilitator. As a facilitator, I provided instructional support for six elementary
schools across the large school system of over 50 schools. Working with individuals or teacher
teams, I provided professional development, guided meetings, planned with teachers, and
presented information. Although I advised teachers, I was not in an administrative role and did
not have evaluative authority over teachers. This new role aided my dissertation research,
enabling me to interact with hundreds of staff members in different schools and recruit teachers for my study.

Based on the experiences I have described, I needed to bracket out the following presuppositions about word study as I analyzed the word study data:

- Word study is an effective and developmentally appropriate program.
- Education and training is important for teachers to implement word study with validity.
- If used appropriately, word study can be implemented efficiently within the broader elementary curriculum on a consistent basis.
- Word study is useful for elementary teachers in kindergarten through fifth grade and potentially effective at the middle school level.
- Differentiation to meet a range of students’ needs is possible through word study.

Although my presuppositions are based on authentic experience, they are limited for multiple reasons. First, I only taught in two different schools over my 11 years in the classroom and professional learning communities, community relationships and classroom dynamics are unique. Second, my teaching was only in three grades out of the six possible levels. Each grade level has different standardized curriculums as well as developmental needs for students. Third, no matter the length of experience, the constantly evolving educational landscape constantly makes new school experiences with unique obstacles and opportunities for success. As a researcher, I must consistently remind myself to respect the professional judgement of the educators in the classroom and avoid making judgements about their instructional decisions. Furthermore, I must remain objective as I survey, interview, and observe teachers, despite my preference for the word study program.
# APPENDIX J: PRINCIPAL INTERVIEW QUESTIONS

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<tr>
<th>General Information</th>
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<tbody>
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<td>Date of interview:</td>
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<td>Length of Interview:</td>
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<table>
<thead>
<tr>
<th>Subject’s Contact Information</th>
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<tbody>
<tr>
<td>Name:</td>
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<td>Email:</td>
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<td>Work phone:</td>
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<table>
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<tr>
<th>Main Interview</th>
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</table>
| I: In your opinion, what are the pros and cons to word study?  
S: |
| I: What changes, either positive or negative, have you noticed in reading, spelling, and/or writing performance in response to word study?  
S: |
| I: Do you have any particular success stories connected to word study?  
S: |
| I: Based on your observations as a principal, do you see what is learned by incorporating word study carries over to the next grade level?  
S: |
| I: What is your role in the implementation of word study in your school?  
S: |
| I: How would you describe the fidelity of implementation?  
S: |
| I: Have you noticed any specific obstacles that have prevented or hindered implementation?  
S: |
| I: What are your goals for the future of word study at (SCHOOL NAME)?  
S: |

Notes: