# University of Alberta

The Professional Lives of Reading Teachers in
Non-metropolitan School Districts

by

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# ABSTRACT

Research suggests that highly qualified teachers are an important factor in improving the reading performance of children. This study began with a question about how teachers with a reading specialization used their expertise to advance the quality of instruction in non-metropolitan schools and school jurisdictions. Very little research on the roles of reading specialists in Canadian learning environments is available. This qualitative study sought to give a voice to the experiences of three teachers who first became reading specialists because they wanted to be better at helping struggling readers. They then became teacher leaders, guiding other teachers in their schools and districts to provide quality reading instruction for students. Through multiple, extensive interviews with the three participants, I learned the stories of how they became engaged in advanced study of reading, what they were able to contribute to reading instruction and literacy education in their schools and regions, and what sorts of collegial experiences the reading teacher leadership had afforded them.

When analyzed, the data revealed teachers who, throughout their careers, consistently sought ways to make literacy learning more relevant and more successful, who were eager to share their knowledge with other teachers, who were passionate about the work they did, and who were ultimately disappointed. The disappointment was precipitated by the realization that no matter what productive work the reading specialists were engaged in, district administrators placed limited value on teacher expertise. As a result, the non-urban school

districts that traditionally had few teachers with specializations in any subject area, were prematurely stripped of their valuable teacher resources when, in reaction to their treatment, the study participants retired or left the district.

In order to promote lasting, quality academic improvement among students, school district administrators need to formally recognize, through policy, that the best performance from students comes from classrooms with the best educated teachers, and thus encourage more teachers to pursue studies beyond a basic teacher education.

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CHAPTER ONE

INTRODUCTION AND BACKGROUND TO THE STUDY


Introduction

In the late 1980s I became an adult literacy specialist.  I completed a

Master of Education degree in Adult and Higher Education, specializing in adult

literacy.  With the degree, I left the kindergarten to grade 12 education system to

work with adults struggling to improve their reading and writing.  Several years

later, my previous experiences with elementary school teaching led to an

invitation to instruct and supervise field experiences for pre-service teachers.

Since my work had taken me away from the elementary classroom, it had never

occurred to me that I could have used my specialized education in reading to

inform the practice of teachers in K-12 classrooms. However, over the course of

the next five years, while I supervised several dozen student teachers, I found I

was often able to provide suggestions for reading strategies and activities that

could be useful for a whole class of students or for struggling individuals.  In

discussions with the aspiring teachers, I learned that many were troubled by

uncertainty about their ability to teach reading.  Furthermore, I saw classrooms

that did not provide these pre-service teachers with particularly rich examples of

good reading instruction.  I saw teachers adopting (or being required to adopt)

programs that, though sound in many ways, were missing significant pieces that I

believed were important for good quality instruction in reading.  I wondered if some reading strategies were not taught well because the teachers did not understand the theory guiding the practice.  I realized that my opportunity to pursue graduate course work in reading instruction had provided me with a much greater understanding of reading and writing instruction than what I had gleaned from my pre-service education or teaching experiences.

During my doctoral studies, I came to realize that our learning as teachers is not very different from that of children in K-12 classrooms; it evolves through the construction of meaning derived from our experiences and from the experiences of others with whom we interact, particularly our fellow students and practitioners.  As I further studied the art and science of teaching reading, and continued instructing pre-service teachers, I speculated that undergraduate teacher preparation programs could only lay the groundwork for learning the theories and practices for reading instruction.  Personal experience and observation of colleagues led me to surmise that when teachers continue their professional education and enroll in graduate courses in reading, they build on their undergraduate experiences and on their experiences in teaching children to read. Since graduate courses are detailed and specific, they provide a rich theoretical knowledge that teachers combine with practical experience to enhance their capacity to address the particular needs of their students.

The influential American report Preventing Reading Difficulties in Young Children (Snow, Burns and Griffin, 1998) identifies the importance of good quality teaching in helping children learn to read.  Other research examining

different approaches to teaching reading identify the significance of "highly trained and qualified teachers" (Dole, 2004, p. 464) as a determining factor in greater student improvement in reading: "the best teachers produced students who progressed the most" (Dole, 2004, p. 464). Dole (2004) maintains, "the teacher was more important than the reading model or program" (p.464). Taylor, Pearson, Peterson and Rodriquez (2003) reported a similar conclusion. It would appear that the skills of the reading specialist might make a difference in the overall reading performance of children in the classroom. However, additional study of children who have made gains under the instruction of a reading specialist show that they do not necessarily retain those gains when the specialist's support is no longer available to supplement regular classroom instruction from the non-specialist teacher (Dole, 2004). The absence of continuous progress has been blamed primarily on a lack of congruity between the remedial instruction from the specialist and the ongoing regular classroom instruction by the teacher (Tancock, 1995). One possible explanation for this conclusion could be the fact that when compared to reading specialists, classroom teachers have less education in the theoretical underpinnings and techniques for teaching reading. They are therefore not able to support the continuing needs of the struggling reader once the specialist's help is no longer available. Researchers also contend that although the reading specialist is likely to be more informed about progressive reading approaches than the average teacher, it is the specialist who tends to receive additional high quality in-service training (Tancock, 1995; Bean, Trovato & Hamilton, 1995), widening the knowledge gap between the two.

The result is that, unless personally inclined to explore the topic of reading

instruction, the classroom teacher is likely to remain static in her understanding

and practice (Tancock, 1995). The results are a lack of congruence between the

regular classroom and the specialist instruction, and a wasted opportunity to

concentrate reading help for children who need it.


Reading Specialization

To situate what I mean by "reading specialist", or teacher with a reading

specialization, I referred to the International Reading Association's (1998)

publication of *Standards for Reading Professionals*. This document specifies the

minimum qualifications reading specialists should possess. These qualifications

include advanced graduate reading preparation with theoretical foundations,

clinical training that includes working with a reader experiencing difficulty, and

classroom experience. In Alberta, the designation of "reading specialist" is

mostly self-initiated as there is no certifying body in the province. We tend to

identify teachers as having a reading specialization if they have completed

graduate level clinical reading and language arts theory courses at university,

usually as part of a Master's degree program in Elementary Education. The

Northern Alberta Reading Specialist Council (NARSC), a reading teacher

professional organization, requires that members demonstrate completion of

advanced study beyond a Bachelor of Education in specific topics such as

Theories of Reading, Curriculum Studies, Educational Research, and Assessment

and Remediation of Reading and Writing Difficulties (most members have

completed a Master's degree in order to meet the qualifications), but this body does not certify reading specialists in any formal way.  Despite the lack of formal recognition, the major metropolitan school divisions are influenced by the NARSC qualifications when they search for reading specialists for their own school jurisdictions.

For the purpose of this study, I define 'reading specialists' or 'teachers with a reading specialization' as teachers who have completed graduate level courses in reading, including Assessment and Remediation of Reading and Writing Difficulties.

The Purpose of the Study

Whether speaking to novice teachers or those with many years of experience, our conversations have often been about the challenges of helping every child develop into a proficient reader.  In spite of their success with most students, teachers agonize over those for whom they have limited success in helping to overcome barriers to learning to read.  Some teachers are sufficiently frustrated that they seek to upgrade their skills by returning to university to gain a specialization in reading.  Once they have completed these advanced courses, what do they do?  How do the children they work with benefit from their training? Are they able to provide guidance for teacher colleagues who have not had the benefit of study beyond basic pre-service education and in-service workshops?  Is there recognition of their expertise by the decision makers in their school jurisdictions?  As indicated earlier, studies show that it is the quality of the

teacher, not the program that makes the most difference in student progress (Dole, 2004; Darling-Hammond, 1999; Allington, 2002; Cunningham & Allington, 2006).  Do those teachers with the most expertise have the opportunity to share what they know with other teachers? In Alberta, there is no recorded research describing how teachers with reading specializations put their expertise to use. However, personal experience informs me that Master of Education graduates with a reading specialization may be found as regular classroom teachers, as school district consultants, as seconded consultants to the provincial Ministry of Education, as school or district administrators, and as private consultants.  This list describes where these graduates are found, but it does not explain how they have used their specialization.

I entered into this study to pursue an understanding about how teachers with a reading specialization used their expertise to advance the quality of instruction in non-urban schools and school jurisdictions. My investigations were guided by the following research question:

- What are the professional experiences of classroom teachers with a reading specialization in non-metropolitan school districts?

Through conversations with the participants I wanted to learn:

- How participants used the knowledge they gained through graduate level reading and language arts courses in their practices as teachers of reading.

- What participants considered as their contributions to literacy education in their schools or regions.

- What kinds of collegial experiences (focused on reading instruction) the participants had in their schools or regions.

Significance of the Study

A review of the literature suggests that there is little documented information on the experiences and aspirations of teachers with specializations in reading in Alberta or Canada. Very few school jurisdictions, particularly outside the metropolitan areas, have designated reading specialists. Through this study, I hoped to provide some insights into the experiences of teachers with reading specializations, and to describe how the participants used this expertise to improve their practice and perhaps to change the practice of other teachers with whom they interacted.

With respect to teachers with reading specializations practicing in regular classrooms, this study was intended to see how the teachers used their expertise to improve the quality of reading instruction in their classrooms and schools. Research on leadership capacity and school reform (Lambert, 1998, 2003) suggests that teachers have the skills and knowledge to effect positive changes if they are given the opportunity and appropriate climate. My experience tells me that many new elementary school teachers, and some experienced ones, lack confidence in their abilities to teach reading effectively. They need to find ways to create more collaborative and supportive environments to help overcome this lack of confidence. One obvious approach would be to make use of the reading expertise available within a school or district. Through conversations with the participants in this study, I wanted to discover what creative practices they and

their school jurisdictions have participated in to further develop the leadership potential for teachers with reading specializations.

Utilizing the expertise that exists within our schools and districts seemed an effective and fiscally responsible practice. Investigating the experiences of teachers who hold that expertise was a logical place to begin a process of understanding what exists and what could be the potential of using the local reading expertise.

Reflections on an Independent Study

Early in my doctoral program, I became interested in learning about the work of reading specialists in Alberta. After searching in vain for published research devoted to this topic, I decided to make a limited attempt to explore what they do. In Alberta, specialized reading teachers are often thought of as diagnosticians, testing children referred to them by classroom teachers looking for remediation advice or referred by schools seeking evidence that extra funding is required to meet the learning needs of a child. As well, teachers with reading specializations are also regular classroom teachers, principals and consultants. Although a tremendous value to the children in their individual classrooms, it could be argued that there is an under utilization of a valuable resource if these teachers with specialized education are unable to help struggling readers in other classrooms. It is unlikely that the economics of school budgeting in smaller districts allows for the employment of specialized reading teachers (Stangeland, personal communication, April 2004), but it may be possible for mechanisms to

be implemented to use this easily accessible knowledge pool to assist others in becoming better teachers of reading.

In a previous study of two recently retired teachers with specialized reading education, I explored the experiences and aspirations of the two teachers. Through interviews with them, I was able to develop narratives of mixed opportunities in their careers from the 1980s to 2004. One participant was recognized for leadership potential and given the opportunities for administrative and leadership roles at both the school and district level. The other was informally recognized for her knowledge within her own school, but offered only limited opportunities to use her knowledge in a more formal or broader district applications. It is important to note that this study was delimited by the fact that the careers of both participants were situated in major urban school districts that had extensive programs of consultants and teaching specialists dedicated to assisting teachers and students in schools.

This independent study led me to wonder what experiences teachers with a reading specialization might have in non-metropolitan areas of the province where it is likely that fewer resources are available. Also, the independent study helped me to narrow and define the questions for the research reported in this dissertation.

CHAPTER TWO

A REVIEW OF THE LITERATURE


In reviewing the literature, I wanted to situate my research questions and

my participants in the philosophies and trends that have driven reading instruction

for the past 30 to 40 years. As well, I wanted to concentrate on a number of

issues, strategies and techniques upon which educators have focused. I, therefore,

have focused this literature review on topics such as phonemic awareness,

Reading Recovery, content area reading, emergent literacy practices, vocabulary

development and writing. I then explored the roles and responsibilities of the

reading specialist in order to understand the place of the instructional leader in

reading within the context of the profession and the school, particularly in recent

times in Alberta. I wanted to embed this role in the larger picture of teacher

leadership and leadership capacity building, in order to understand how teachers

with reading specializations might serve as leaders to others.


A Brief History of Teaching Reading – Beginning in the 1960s

How best to teach reading has been a historically contentious issue

(Robinson, Baker & Clegg, 1998). David Pearson (2004), eminent reading

researcher, outlined the history of reading instruction in a chapter found in

"*Preparing reading professionals: A collection from the International Reading

Association*". Using this source as a reference point, I have traced the

developments and trends in reading instruction that influenced the teachers

interviewed for this study.

From early in the 20th century until the late 1960s, the method known as

the "look-say" approach (high-frequency words practiced through stories with

controlled vocabulary [for example, Dick and Jane Readers], with phonics

instruction based on already learned words following later) gained prominence

until "over 90% of the students in the country [U.S.] were taught to read using

one commercial variation of this approach or another" (Pearson, 2004, p.6).  The

published materials were generally referred to as basal readers.  However, by the

late 1960s, a number of elements came together that challenged the efficacy of

this approach.

Early in the 1960s, the U.S. government funded several comparative

academic studies of beginning reading instruction, collectively referred to as the

"First-Grade Reading Studies" (Bond & Dykstra, 1967).  The studies found that

approaches other than the 'look-say' basal readers were at least as effective or

more effective than the dominant approach.  One of the funded studies led to the

publication of Chall's *Learning to Read: The Great Debate* (1967), which further

criticized the basal reader programs for, among other things, lacking in systematic

phonics instruction from the start of reading instruction.

Also in the 1960s, reading as a process and reading instruction came under

the influence of an expanding cadre of scholarly fields.  Pearson (2004)

writes:

Reading became an ecumenical scholarly commodity; it was embraced by

scholars from many different fields of inquiry.  The first to take reading

under their wing were the linguists, who wanted to convince us that reading

was a language process closely allied to the language processes of writing,

speaking, and listening.  Then came the psycholinguists and the cognitive

psychologists, followed soon by the sociolinguists, the philosophers, the

literary critics, and the critical theorists. (p. 11)

Pearson goes on to suggest that "the influence of these other scholarly traditions

on reading pedagogy is significant" (p. 11), and that in order to understand

subsequent developments in reading instruction it is important to be familiar with

the historical developments in these fields.

*New Thoughts on Language Acquisition*

As Pearson (2004) notes, the linguists in the mid-twentieth century,

notably Charles Fries and Noam Chomsky, were convinced that, owing to the

complexity of language, children could not possibly be "taught" all that they

manage to learn in their short lives prior to attending school, unless their minds

were pre-programmed to assimilate the complex rules of language.  This

perspective, which challenged the hitherto widely accepted behaviourist

foundations of language acquisition, led to the questioning of theories of reading

acquisition, also founded on behaviourist theory.  Perhaps there were aspects of

reading that knowledge of oral language would naturally facilitate, and therefore,

did not need to be 'taught'.

*Psycholinguistic and Sociolinguistic Approaches*

Chomsky's work on language acquisition was instrumental in spawning a new field of academic thought and research: psycholinguistics. During the 1960s and early 1970s, first Kenneth Goodman and then Frank Smith added psycholinguistics to the new ways of thinking about reading and learning to read. Goodman postulated that children use their knowledge of oral language to trigger a repertoire of cueing systems semantic cues, syntactic cues and graphophonic cues - to make sense of written text, through a series of confirmed or disconfirmed predictions (Goodman, 1997). He suggested that by studying readers' miscues (not reading mistakes), teachers could determine how effectively children were using each of these cueing systems, and then assist children to learn to read more effectively and efficiently by providing instruction and practice in areas of weakness.

Smith (1971) contended that literacy abilities were attained in much the same way children learn to speak. Because they are members of a literate society, children learn to read by reading, as initiates into the "Literacy Club" (Smith, 1985), which they enter with the intention of becoming readers. He writes, "Children do not read in order to make sense of print. They strive to make sense of print as a consequence of learning to read" (Smith, 1985, p. 120). He further postulated that it is not necessary to "teach" reading, but to provide for the circumstances that will facilitate the opportunity to learn to read through a construction of meaning. According to Smith, it was the job of all literate adults,

including and especially teachers, to create the optimum climate for reading

acquisition to take place, to "make sure that reading – and learning to read – make

sense to children" (Smith, 1985, p. 128). Smith insisted that reading instruction

that took place outside the meaning structure, such as in the case of systematic

phonics and phonemic awareness approaches, actually hindered some children's

ability to learn to read (Smith, 1999). For both Goodman and Smith, making

sense while reading was the key, and making sense did not simply occur by

saying the words right, but was a process of actively constructing meaning.

*The Psycholinguists and Schema Theory*

Psychologists in the 1970s exhibited a renewed interest in the processes of

reading, and particularly in how readers make sense of text. One of the most

significant results was the incorporation of Piagetian notions of assimilation and

accommodation into the theoretical concepts of schema (Anderson & Pearson,

1994). Reading theorists embraced the idea that readers develop an understanding

of what they read by assimilating information that coincides with what they

already know, or changing their knowledge structures (schema) when the

information does not 'fit', thus accommodating the new information. These

theorists reasoned that good readers are able to use their background knowledge

to help to assimilate and accommodate information (Anderson, 1984). Schema

theory, and particularly the understanding that different people will possess

different schemata on a similar topic, helped to explain why readers might

construct different meaning from the same text. As Pearson (2004) points out,

schema theory "promoted a constructivist view of comprehension; all readers must, at every moment in the reading process, construct a coherent model of reading for the text they read" (p. 16).

Sociolinguistic theory, that is, theory that focuses on the social and cultural influences of language use, shares common ground with psycholinguistics in the development of theory related to reading. The field of sociolinguistics evolved within the same era as psycholinguistics, as linguistic researchers began focusing on speakers of non-standard English dialects. Sociolinguists proposed that speakers of dialects were not deficient in their language, simply different (Labov, 1972) as a result of speaking variations of the language that have a distinct grammar. Moreover, the students were aware that their language and culture were considered inferior in comparison to the literacy used at school, and they experienced school-based literacy as reflecting a culture from which they felt rejected. Labov situated the "major cause of reading failure (as) political and cultural conflicts in the classroom, … dialect differences are important because they are symbols of this conflict" (1972, p. xiv). Attempts to translate this theory to practice were largely unsuccessful, but sociolinguists were able to influence educators and theorists to consider the socio-cultural context in which speaking, reading and writing take place, and to shift the constructivist theory to include consideration of how the social-cultural context impacts how schema are created (Pearson, 2004).

Labov's work aided in a shift to an understanding that language development and reading are individually and socially constructed and this shift

was subsequently supported by the translations and interpretations of the 1920s and 1930s work of Russian cognitive psychologist, Lev Vygotsky (1978). From Vygotsky's study of how language is used he came to believe that all learning, including learning to read, was socially constructed under the guidance of the 'knowledgeable' other (the teacher or another experienced user of the language) (Vygotsky, 1978). Vygotsky's work supported and confirmed much of the work of the psycholinguists and sociolinguists.

### *Towards a Synthesis*

The theoretical movements of this time period also coincided with the revitalization of reader-response theory, first proposed by Rosenblatt (1978) in the 1930s and reintroduced in the late 1970s. Rosenblatt envisioned reading as a process in which the reader transacts with the text to construct an individual interpretation of the text (Rosenblatt, 1995; Mills & Stephens, 2004). She used the term 'transaction' to describe how the reader and the text work together to make the new construction. The transaction takes place through what Rosenblatt (1995) referred to as a "lived through" (p.68) experience with the text. The new life that Rosenblatt's theory enjoyed after it was republished in the 1970s was likely the result of the growing popularity of the constructivist theory of learning.

As a result of the work of sociolinguists and psycholinguists, the expanding acceptance of Rosenblatt's reader-response theory, and the over-arching umbrella of constructivism and social constructivism, I suggest that by the mid-1980s many researchers in the reading field were comfortable with the

statement found in the report to the U.S. Commission on Reading, *Becoming a Nation of Readers*: "Reading is the process of constructing meaning from written texts" (Anderson, Heibert, Scott & Wilkinson, 1985, p.7). That, of course, meant readers need meaningful text with which to engage. The basal readers, the mainstay of reading instruction for the first half of the twentieth century were being replaced by authentic children's literature. Pearson (2004) comments, "the logic was that if we could provide students with real literature and real motivations for reading it, much of what is arduous about skill teaching and learning would take care of itself" (p. 19).

The availability of authentic children's literature was absolutely essential for what was arguably the most dynamic innovation of language and literacy in the second half of the 20th century, "whole language". Pearson (2004) characterizes whole language this way:

Whole language is grounded in child-centred pedagogy reminiscent of the progressive education movement (the individual child is the most important curriculum informant). Philosophically, it is biased toward radical constructivist epistemology (all readers must construct their own meaning for the texts they encounter). Currically, it is committed to authentic activity (real, not specially constructed, texts and tasks) and integration (both within the language arts and between the language arts and other subject matters). Politically, it is suspicious of all attempts to mandate and control curricular decisions beyond the classroom level; as such, it places

great faith and hope in the wisdom of teachers to exercise professional prerogative in making decisions about the children in their care. (p. 21)

Although it was in vogue for only a short period of time, whole language enjoyed a great deal of support from reading researchers and teachers. Publishers, responding to the loss of markets as basal readers lost favour and to the clamour for authentic literature for classroom libraries, began publishing more books by children's authors, and developing books resembling authentic children's literature. Pearson (2004) notes that "acceptance for whole language was not universal" (p.22), but it did enjoy significant and enthusiastic support, particularly among reading scholars. Though many teachers were intuitively drawn to whole language, researchers found that they did not follow the design of whole language principles. In the late 1990s, Baumann, Hoffman, Moon and Duffy-Hester (1998) conducted an extensive nationwide survey in the U.S., and found that more that 3/4 of the teachers "provided children a balanced, eclectic program involving both reading skill instruction and immersion in enriched literacy experiences" (p. 637).

The ascendance of whole language and the emphasis on meaning over systematic sound-symbol skills renewed Chall's (1967) Great Debate, as theorists and researchers on both sides of the argument gathered data to "prove" the soundness of their particular approach. At the same time, politicians were inclined to develop education policy on the basis of popular beliefs rather than careful analysis of the evidence (Innes, 1998; Krashen, 1998b; Baumann, et al., 1998). In an attempt to determine what truly were the 'best' ways to teach reading (Yatvin, 2002) and put an end to the controversy, the U.S. Congress initiated the National

Reading Panel (NRP).  The NRP reviewed research findings from reading studies

selected on a narrowly defined set of criteria.  Unfortunately, significant voices

from the literacy field found the final document from the work of the panel (NRP,

2000) fatally flawed, simply fuelling the controversy (Allington, 2002).

Nevertheless, the basic recommendations of the report were embraced by the

politicians, and through subsequent legislation, particularly portions of the 2002

*No Child Left Behind Act* (NCLB) (National Reading Panel), the five pillars of

reading instruction, phonemic awareness, phonics, fluency, vocabulary and

comprehension, became central instructional requirements for programs wishing

to receive funding from the American government.  In subsequent years, since the

release of the NRP report and NCLB-legislated demand for 'scientifically

evidenced' instructional processes, many newly created commercial programs, as

well as reworked old ones, have significantly influenced reading instruction both

in the U.S. and in Canada.  Initially, phonics, phonemic awareness and fluency

garnered the most attention, primarily because research studies already existed to

support them (e.g. Adams, 1990, Bryne & Fielding-Barnsley, 1989), but more

recent research supporting the explicit instruction of vocabulary and

comprehension strategies is now gaining greater prominence (Pearson, 2004;

Block & Pressley, 2007; Blachowicz & Fisher, 2007)

In the historical record of reading instruction, phonics and fluency have

enjoyed prominence as instructional focuses intermittently throughout the

twentieth century (Pearson, 2004).  Phonemic awareness, on the other hand, was a

relative newcomer that gained attention with Adam's (1990) work.  It was less

prominent and not well understood until its incorporation in the NRP 2000 report

as one of the pillars of "scientifically" verifiable requirements for learning to read.

The clashes between academics promoting phonics skills and those

promoting knowledge-based reading instruction continue, with one side or the

other, by turns, claiming the moral high ground.  However, in 2004, Pearson

suggested that:

> We are on the verge of a new paradigm, a hybrid that weds some of the
>
> principles of whole language (integrated instruction and authentic texts and
>
> tasks) with some of the traditions of earlier eras (explicit attentions to skills
>
> and strategies, some vocabulary control of early readers and lots of early
>
> emphasis on the code) in an 'ecologically balanced' approach to reading
>
> instruction. (p. 31)

Pearson explained his support for 'balance' as stemming from his own

background knowledge about reading and from what he called "wisdom of

practice" (p. 32), referring to the studies that have repeatedly shown that

exemplary teachers use "a balanced repertoire of instructional strategies" (p. 32).

His view was supported by several studies of exemplary teachers (e.g. Pressley,

Allington, Wharton-MacDonald, Block, & Morrow, 2001; Allington & Johnson,

2002).  A balanced approach, Pearson suggested, might be the "only alternative to

the pendulum-swing view of our pedagogical history that seems to have plagued

the field of reading for most of the 20th century" (p.32), and might result in a

"transformative rather than a cyclical" (p. 32) perspective that could drive our

understanding forward.  It should be noted that 'balanced' refers to approaches to

reading that are different than Rosenblatt's 'transactional' concepts in that the former connotes a complexity that is not defined in terms of the separate parts.

Pearson's words appear prophetic, as teachers have adopted the use of organizational structures such as the "Three Blocks" (Fountas and Pinnell. 2001) or "Four Blocks" (Brailsford, 2002; Rogg, 2003; Cunningham & Allington, 2007) systems of instruction, that are said to reflect a balanced philosophical stance to literacy instruction. The blocks may include a language and word study block (working with code-breaking activities and vocabulary), a reading instruction block focusing on comprehension strategies and literature studies (meaning oriented), a writing block that is often fashioned on the Writing Workshop (Atwell, 1987) model, and a self-selected reading block where the children have scheduled time to do independent reading with a focus on reading for pleasure.

Since the primary focus of the debate in reading instruction was focused on initial reading instruction, instructional designs first focused on the early school grades. But as the notion of balanced instruction has developed, its value has been suggested for the more advanced reading instruction required in the upper elementary grades and beyond. In the higher grades, however, the phonics instruction emphasized in the early grades is replaced with more instruction in vocabulary development. Guided reading topics focus more extensively on the reader's approach to exposition and content area reading (Cunningham & Allington, 2007).

However, several writers, including Pearson and Raphael (2003, 2007), Ivey, Baumann and Jarrard (2000), and Weaver (1998) worry that balance does

not simply mean using a potpourri of strategies either "focused on *breaking the code* … or *understanding what we read* (original emphasis)" (Pearson & Raphael, 2007, p. 32).  Ivey et al. described their concerns this way:

> We believe that implementation is complex and involves even more than just knowing a range of methods and recognizing the appropriate occasions for using them. In a real classroom, teaching from an eclectic perspective also requires the careful orchestration of time, resources, and activities. (Abstract section, ¶ 7)

It's important to note that, in Alberta, the Language Arts Program of Studies (Alberta Learning, 2000) has long recognized the importance of a balanced approach to instruction.  In each of the five general outcomes, all six of the identified language arts - reading, writing, speaking, listening, viewing and representing – are integrated.  The curriculum document specifically states, "It is intended that students engage in purposeful language activities that respect individual differences and emphasize the interrelated and mutually supportive outcomes" (Alberta Learning, 2000, p. 4).  The Alberta Language Arts Program of Studies is derived from sociolinguistic, psycholinguistic, and constructivist perspectives that rely heavily on the philosophy of holistic language instruction with a focus on authentic purposes for language use in the classroom. Furthermore, although outlining the expected outcomes students are expected to meet through the grades, the curriculum document does not specify methods of instruction that teachers must use.

Selected Influences on Current Reading Instruction

As different movements and trends in reading have become popular in the recent history of teaching reading, teachers came to embrace approaches that they believed would provide the kind of instruction children needed to learn to become readers. I would like to discuss some of the influential trends that have shaped reading programs in recent years. These include phonemic awareness, Reading Recovery, content reading comprehension, vocabulary development and emergent writing.

*Phonemic Awareness*

Although the concept of phonemic awareness has been in the lexicon of reading instruction from early in the 20$^{th}$ century, its instructional importance gained stature through the late 1990s and into the new century. The primary reason was that it was named one of the five pillars of reading identified in the National Reading Panel report (2000) in the U.S. The phonemic awareness subgroup's meta-analysis report (Ehri, Nunes, Willows, Schuster, Yaghoub-Zadeh & Shanahan, 2001) identified three reasons for the NRP's interest in it. First, they contended that research "had identified phonemic awareness and letter knowledge as the two best school-entry predictors of how well children will learn to read during the first two years of instruction" (p. 253); second, phonemic awareness instruction had been the subject of "many experimental studies" (p. 253); and third, there was a significant public interest in phonemic awareness programs because of claims of considerable success in using them.

The International Reading Association position statement on "Phonemic Awareness and the Teaching of Reading" (IRA, 1998) stated that there is "no single definition of phonemic awareness" (p.2) though it goes on to explain:

> Phonemic awareness is typically described as an insight about oral language and in particular about the segmentation of sounds that are used in speech communication. Phonemic awareness is characterized in terms of the facility of the language learner to manipulate the sounds of oral speech. (p. 2)

The Ehri et al. report (2001) defines phonemic awareness as "the ability to focus on and manipulate phonemes in spoken words" (p. 253). The report continues with an explanation of how phonemic awareness capacity is assessed in children. The six criteria are:

1. Phonemic isolation – recognizing individual sounds in word
2. Phonemic identity – recognizing common sounds in words
3. Phonemic categorization – identifying which word does not fit in a sequence of three or four words
4. Phonemic blending – blending a set of sounds into a recognizable word
5. Phonemic segmentation - breaking a word into its component sounds
6. Phoneme deletion – identifying the remaining word when a sound is removed (p. 152)

Typically, authors who discuss phonemic awareness are quick to point out that it is not an interchangeable term with 'phonological awareness', which encompasses a broader study of sounds; nor is it phonics, which is more concerned with letter-

sound relationships for both reading and writing (Yopp, 1995; IRA, 1998; NRP, 2000). In fact, Juel (1988) contended "phonics instruction is not effective unless children have (or quickly develop) some phonemic awareness at the beginning of first grade" (p.437).

Most studies that include an investigation of young children's (kindergarten or beginning grade one) knowledge of the components of phonemic awareness listed above conclude that such knowledge is a good predictor of reading success (Juel, 1988; Yopp, 1992; IRA 1998; Erhi, et al., 2001; Reading & Van Deuren, 2007). Furthermore, many educators and researchers believe that instruction in phonemic awareness in grade one aids young readers in developing the necessary skills for decoding words and learning phonics skills for encoding. Juel (1988), in her study of first and fourth grade readers, commented

the children who became poor readers entered first grade with little phonemic awareness. Although their phonemic awareness steadily increased in the first grade, they left this grade with a little less phonemic awareness than that which children who became average or good readers possessed upon entering first grade. (p. 444)

Her conclusion was that "more phonemic awareness training should occur in preschools and kindergarten, and if needed, even in first grade" (p. 446).

The IRA (1998) position paper acknowledged the predictive capacity of phonemic awareness, but was emphatic that any instruction in phonemic awareness be thoroughly embedded in opportunities to play with spoken language

through rhymes, songs, poems, word riddles and read aloud books. The IRA paper states:

> There is evidence to suggest that the relation between phonemic awareness and learning to read is reciprocal: phonemic awareness supports reading acquisition, and reading instruction and experiences with print facilitate phonemic awareness development.  The question remains as to the amount and forms of phonemic awareness one must have in order to profit from reading instruction that is focused on decoding. (p. 5)

Yopp (1995), the developer of a test of phonemic awareness, was also supportive of the idea of authentic reading and speaking experiences within a program of explicit instruction for supporting the development of phonemic awareness.  She emphasized, "phonemic awareness should not be addressed as an abstract isolated skill to be acquired through drill type activities" (p. 27).

More recent studies of the impact of phonemic awareness instruction on reading acquisition (Reading & Van Deuren, 2007; Tivnan & Hemphill, 2005), continue to emphasize the importance of explicit instruction for those children lacking in phonemic awareness, but indicate that acquiring these skills might not be as strong a predictor of reading comprehension ability as earlier presumed.

### *Reading Recovery*

Unlike phonemic awareness, which is a cognitive ability that develops when children have the opportunity to 'play' with oral language word and sounds, Reading Recovery is a program of intervention instruction for children exhibiting

difficulties with learning to read. Initially created in New Zealand by Marie Clay, Reading Recovery was introduced into North American schools beginning in the mid-1980s (Pinnell, Fried & Estice, 1990). Because it is a program, Reading Recovery (RR) consists of specific tasks and activities for which the Reading Recovery teacher must take extensive specialized training. Once trained, the RR teacher works one-on-one for approximately 30 minutes each day with struggling first grade readers. The program was designed to be a relatively short-term treatment intended to close the gap between struggling learners and average performing peers early in the literacy instruction process (Pinnell et al., 1990; Schwartz, 2005). Instruction is fast-paced and intensely focused on the learner's specific needs, as identified by the RR teacher (Pinnell et al.; Clay, 1993). Pinnell et al. identified five parts to a RR lesson:

1. Learner reads at least two familiar stories; ones that learner has read and worked with in previous lessons

2. Teacher takes a running record of the learner reading a text introduced in the previous lesson in order to assist in monitoring where the learner is experiencing difficulty

3. Learner works with letters or other decoding strategies recognized through the oral reading as problematic for the learner

4. Learner creates a short written text - a story or message - with a minimum of assistance from the teacher as practice for developing the sound and letter relationships. The teacher writes the sentence(s) on strips and cuts them into words for the learner to reassemble into correct sentences.

5. Teacher introduces a new book, which the teacher and learner look at and discuss (pictures and story). The learner then reads the story with assistance from the teacher. This book will be used for the running record for the next day.

When learners have reached the goal of functioning at the level of the average student in the regular classroom, they are discontinued from the program.

In its initial North American inception in Ohio schools, Reading Recovery was seen as highly successful in assisting struggling readers to overcome their deficits (Pinnell et al.). Through the years there have been many studies and reports, mostly reporting positive results for children meeting their reading goals in the program. Pinnell and Lyons (1994) conducted a study comparing Reading Recovery and three other literacy programs using one-on-one instruction, and concluded that the students from the Reading Recovery treatment had achieved better than those in other programs. The authors concluded that a primary reason for the success was a direct result of the quality of the teaching. They explained,

RR teachers call on a network of support that is ongoing. Through continuing contact and professional conferences, they are expected to continue their learning. The RR network creates a system within which teachers talk about their work and which confirms the value of what they do. This system links personnel in universities and school districts in extended discourse over long periods of time." (p. 36)

More recently, Cox and Hopkins (2006) contended that the program has enjoyed extensive implementation, citing that "RR has served approximately 1.4

million children in the United States (1.75% of all first-grade students)" (p. 255).

They go on to cite many studies that demonstrate the benefits of the program for struggling readers.  D'Agostino and Murphy's (2004) meta-analysis of 36 studies of Reading Recovery, though mindful of the difficulties that prevent comparative evaluations of the program, for example "student selection and attrition policies" (p. 23), came to the conclusion that,

> To date, the bulk of available evidence indicated that RR has had positive effects on participating students across outcomes designed for the program and external to it, and that results of more rigorously designed studies seemed to converge with this conclusion. (p. 35-36)

In spite of the many positive reports about the effectiveness of the program, there are also detractors, who question the objectivity of many of the studies because of the close relationship many of the researchers have to the program (Iversen & Tunmer, 1993; Iversen, Tunmer & Chapman, 2005).  As well, they cite flaws in the methodology of the supportive research that undermine the positive findings.  Tunmer and Chapman (2003) also question the fact that, as a trademarked program, the Reading Recovery developers do not permit changes to the whole design.   More importantly, however, are those who challenge Reading Recovery for its lack of cost-effectiveness resulting from the requirement for one-on-one teacher-student ratio (Pressley, 1998; Shanahan & Barr, 1995).

In spite of the questions concerning cost effectiveness, Reading Recovery appears to continue to play an important part in helping some children learn to read (Cox & Hopkins, 2006).

*Content Area Reading*

As research in the field of reading has developed over the past 50 years, it is safe to generalize that the greatest interest and therefore the greatest amount of financial resources have focused on young children attaining literacy skills. Vacca (2001) asserts "one of the assumptions underlying early literacy policy is that once children learn to read, they will be able to use reading to learn for the rest of their lives" (p. 184). Furthermore, studies that focused on word identification skills have left the public with the impression that if reading difficulties aren't caught in the early years, there is not much chance of remediation; therefore it is pointless to spend extra funds on helping older children learn to read (Wasik & Slavin, 1993).

However, the International Reading Association's Commission on Adolescent Literacy, in response to the trend towards reduced funding for adolescent literacy needs which has resulted in the loss of reading specialists at the secondary school level, identify "principles for supporting adolescents' literacy growth" (Moore, Bean, Birdyshaw, & Rysik, 1999, p. 4). The principles included, among other things, a recognition of the need for "instruction that builds both skills and the desire to read increasingly complex material" (Moore et. al, p. 5).

Guthrie, Alao and Rinehart (1997), in recognizing a tendency for adolescents to lose motivation to read, identify two reasons for the loss. First they contend that children's expectations and beliefs in their ability to succeed steadily

declines through the elementary years, especially for those who have not experienced much success.  The second reason for declining motivation is the lack of positive encouragement from teachers.  Gutherie et al. contend that with the focus on content in the middle and high school grades, "teachers tend to emphasize the excellence of high-achieving students, rather than emphasizing the performance of all students on reading tasks" (p. 440).  They go on to suggest, "it's especially important to create contexts where students feel confident in their abilities and personally invested in the content" (p. 440).

Vacca (2002) also emphasizes the importance of teachers and ways in which they provide instructional support to students, within a social constructivist paradigm.  He identifies what he calls visible and invisible aspects of reading in the content areas, both of which need to be operating for optimal learning to occur. The visible aspects are those skills and strategies teachers explicitly teach. The explicit instruction is important, according to Vacca, but he emphasizes that it must be in conjunction with 'real' learning or there is a danger that the activities may be practiced and mastered, but not transferred to  real content area reading tasks. He outlines a four-part practice for instruction: direct explanation of the strategy, so that students know when, where and how to use the strategy; demonstration of the strategy, in mini-lessons, modeling and think-alouds; strategy practice, where the teacher scaffolds the students' acquisition of the strategy; and strategy application, which could be an assignment where the students need to demonstrate their use of the strategy (Vacca 2002).

Vacca also identifies invisible aspects.  He explains,

teachers make content area reading invisible through the design of well-

planned content literacy lessons… Essentially, there are three points in an

instructional framework at which students can use reading strategies for

comprehension: (1) before reading, (2) during reading, and (3) after

reading text assignments. (p. 196)

The idea is that students will learn to use the strategies to make sense of the text

and to monitor their understanding, because they are actively engaged with the

text throughout the reading, not just left to read and hopefully assimilate the

required information.  Vacca suggests ways of assessing the occurrence of the

invisible processes through class discussions where not only is the content

discussed, but also the reading strategies used. As well, the discussions can

include the ideas and questions that were generated in the reading and writing

activities such as reflective journal entries.

Although content area reading instruction has traditionally been thought of

as the domain of middle years and high school instruction, Moss (2005) makes a

case for instruction of content area literacy to begin at the very earliest stages of

reading instruction.  Moss contends that in today's society there are significant

changes to sources and volumes of informational text individuals are expected to

assimilate in our society.  This is reflected in the kind of reading tasks on the U.S.

National Assessment of Educational Progress (50% of the fourth-grade test and

over 70% or the eight-grade test) (Moss, 2005).  As a result, Moss emphasizes the

necessity of introducing young children to expository texts and the associated

comprehension strategies.  In addition to the external drivers for content area

comprehension instruction, Moss identifies three motivational factors that should encourage teachers. First, contrary to earlier beliefs, young children are as able to understand and work with exposition as they are with narrative text; second, young children are interested in the world and motivated to inquire into their own questions about their world; and third, early exposure to content and exposition helps to develop background knowledge that is necessary to comprehend those prescribed topics children will encounter as they advance in school. Moss suggests that the most viable way of helping children advance their content area literacy is to include appropriate reading strategy instruction and to expose children to the resources in content area studies from the very early grades.

In Alberta, the Program of Studies for English Language Arts (Alberta Learning, 2000) identifies "Managing Ideas and Information" as one of the general outcomes. Beginning in kindergarten, students are expected to learn to access and communicate information, as well as evaluate sources.

*Vocabulary Development*

Just as content area reading tends to be focused mainly on older children and adolescents, much of the research and commentary on vocabulary development is also aimed at older readers. However, given the large volume of words children are expected to learn through their schooling years (Graves, 2002), children need to be exposed to new and interesting words from the earliest developmental stages of literacy at kindergarten and school. This is especially true for young children whose language lags behind their same-age classmates

(Beck & McKeown, 2007), since several studies show that children who come to school with poorly developed vocabulary, in comparison to their classmates, generally remain significantly behind in reading throughout their schooling (Biemiller, 2001). Scott, Jamieson-Noel and Asselin (2003) bring attention to social justice issues by suggesting that language (vocabulary) as a tool for communication can be used to marginalize and devalue "those who are economically or culturally outside the mainstream" (p. 270). The phenomenon of the fourth grade slump, where children begin to exhibit declining reading capability, has also been linked to poor vocabulary knowledge interfering with comprehension (Biemiller, 2003).

Graves (2007) provides a summary of the important findings researchers have made concerning vocabulary development:

- Vocabulary knowledge in kindergarten and grade one is a significant predictor for reading comprehension in the middle and secondary grades.
- Vocabulary difficulties strongly influence the readability of text.
- Teaching vocabulary can improve reading comprehension.
- Growing up in poverty can seriously restrict the vocabulary children learn before beginning school and make attaining an adequate vocabulary a very challenging task.
- Learning English vocabulary is one of the most crucial tasks for English learners.

- Lack of vocabulary can be a crucial factor underlying the school failure of many students. (p. 13)

Just as with the instruction of decoding skills, researchers vary in their emphasis on how much direct teacher involvement is necessary for vocabulary development. While Biemiller (2001, 2003) emphasizes the importance of explicit, teacher-centered instruction, others (Graves, 2007; Beck & McKeown, 2007; Scott, Jamieson-Noel & Asselin, 2003) identify the necessity for the learner to be more central in the learning. In the spirit of balanced instruction, Blachowicz and Fisher (2000) identify four principles for vocabulary instruction. First, words studied need to have personal significance to learners for the most effective learning. Second, children need to be immersed in and surrounded by words. Graves (2007) comments,

One way to build students' vocabularies is to immerse them in a rich array of language experiences so that they learn words through listening, speaking, reading, and writing. In kindergarten and the primary grades, listening and speaking are particularly important for promoting vocabulary growth. In the middle grades, discussion continues to be important. Students of all ages, be they English learners or native English speakers, need to engage frequently in authentic discussions -- give-and-take conversations in which they are given the opportunity to discuss topics thoughtfully. (p. 14)

Third, children learn vocabulary as an incremental achievement through repeated exposure to words presented through multiple sources, where "each exposure adds information about how the word is used in context and its connection to

other words" (Graves p. 227).  Fourth, learning new vocabulary is an active

process of making connections between what a child knows and new concepts to

be learned.

Young children learn new words through listening to and engaging in

spoken interchange.  But Beck and McKeown (2007) contend that this is a

limiting source for words because "everyday conversation rarely contains words

beyond the most common ones" (p. 252).  They also suggest that the books that

beginning readers read independently in school are similarly limited because of

the perceived necessity to keep the vocabulary within developmental boundaries

(controlled vocabulary).  Read-aloud books, on the other hand, provide for

children to hear a greater variety of words in context, and the opportunity for

teachers to actually scaffold the learning of vocabulary through activities

specifically designed for such learning.  In concurrence with Blachowicz and

Fisher's principles for vocabulary instruction, Beck and McKeown (2007)

describe a process called Rich Instruction, which "includes explaining word

meaning in student-friendly language, providing multiple contexts, and requiring

students to process words deeply by identifying and explaining appropriate and

inappropriate uses and situations, and creating multiple contexts" (p. 254).

Reporting on two studies, Beck and McKeown demonstrated how their

instructional methodology allowed kindergarten and grade one students to add

what the researchers identified as sophisticated words to their vocabulary.

Furthermore, the design of the studies also confirmed that the more extensive the

instruction, the more successful the learning.  However, they point out that even

with extensive instruction, 100% learning was not achieved, confirming, "that word learning does not occur easily" (p. 264).

*Emergent to Conventional Writing*

Historically, writing instruction has tended to hold secondary importance to reading instruction (Sulzby, 1992: Clay, 2001; Pardo, 2006). In fact, in recent years, as a result of funding incentives and testing practices (Pardo, 2006), instruction in writing has been virtually overlooked, in spite of strongly held views that reading and writing function reciprocally for young children developing literacy skills (Mayer, 2007). Clay (2001) enthuses that "effective teaching interactions in both activities … has the pleasant ring of a 'two for one' bargain allowing the busy teacher some economy in teaching time" (p. 11). Whether, as Clay postulates, some teachers do not believe that children can write and therefore do not give them the opportunity to do so; or as Pardo suggests, that even though teachers believe in the capacity of and need to allow children to write, they succumb to a school culture that minimizes the importance of writing in emergent literacy, meaning that young children often do not have the opportunity to engage in much writing.

Attempts at written communication are important indicators that young children understand the concept that written symbols are a means of communication that is different than the symbolic use of pictures, and that oral communications can be translated into the written symbols, both necessary concepts in becoming literate (Coker, 2007). With exposure to print and written

text, young children come to know conventions in text, including the relationships between the symbols and spoken sounds, as well as the different formats for text (genre) (Zecker, 1999). As with reading, when children come to school, they may have experienced very different exposure to and understanding of writing. Furthermore, children pass through different stages of development of their writing skills at different times, at different paces and in non-sequential progressions (Sulzby, 1992; Clay, 2001; Mayer, 2007). Clay uses the analogy of solving a jigsaw to describe children's writing development: "As each child learns more about writing, it is as if he or she were putting the same jigsaw puzzle together but solving it in different ways" (p. 15).

As children learn more about reading and decoding, they are better able to produce letters that relate to the sounds they are making; and as they try to write words for communicating (stories, letters, lists and instructions), they become better at recognizing the words and segment sounds in their reading attempts. Children's first attempts at writing usually mimic what they believe writing to be, even if it is unintelligible to more literate others. However, over time, as children become more familiar with conventional forms, the first 'real' word they learn to write is often their own name. In doing so, they show that they understand the 'word' (their name) "is made up of only special marks, placed in a certain order, making a recognizable pattern"(Clay, 2001, p. 14). For some children coming into Grade 1, writing their names may still be a challenge, while many others will be able to write and read their names plus many other words. The challenge for teachers is to provide for instruction that is appropriate to the needs of the

individual child.  Demonstrating the sound connections between words spoken, read and written is important for helping children develop skills for 'invented spelling', thus aiding their writing fluency and forestalling the frustrations children might feel if pressed to develop conventional writing before they are ready (Clay, 2001, Coker, 2007).  Many educators stress the importance of teachers modeling writing by sharing with students what they are writing, and through Language Experience and Shared Pen experiences (Routman, 2005).  Mayer (2007) also stresses the importance of giving children plenty of opportunities to write, citing particularly the motivational attraction of daily personal journals.

Leadership in Reading Instruction

Since the advent of written language, literacy has been seen as an asset to an individual.  However, it's only in the last one hundred years that it has been considered a necessity (Wamsley & Allington, 1995).  Wamsley and Allington point out that with the advent of compulsory education in the 20th century came anxiety over the notion of reading difficulties.  It falls on teachers' shoulders to help children overcome these difficulties.  The problem is that reading difficulties are related to a complex web of issues that teachers face daily in trying to meet the learning needs of children.  In recognition of the complex task of all classroom teachers, the International Reading Association (IRA, 2000), the pre-eminent organization for matters pertaining to the understanding of reading, recognizes that

(s)chools today face a complex and difficult challenge. Classrooms are filled with children with diverse needs, from those who are strong and healthy to those who have emotional, physical, and learning problems; to those who come from high poverty backgrounds or diverse cultural backgrounds; to those who are English language learners struggling with learning to read. These challenges and the need for high levels of literacy, given our technological society, are increasing the demand for a highly competent teacher workforce prepared to address these issues. (¶ 2)

The IRA (2000) position statement on the roles of reading specialists gives voice to the fact that "many teachers feel overwhelmed with the tasks that face them given the range of abilities and achievement in their classrooms" (¶ 3). Research into effective reading instruction identifies that students taught by "highly trained and qualified teachers" (Dole, 2004, p. 464) tend to have the greatest success in learning to read. In recognition of the value and importance of teachers with specialized training in reading, reports such as the "Preventing Reading Difficulties in Young Children" (Snow, Burns & Griffin, 1998), the National Reading Panel report (2000) and the IRA's position statement on the roles of the reading specialist (2000) all identify that professionals with the strongest background and greatest qualification in teaching reading should be available to help struggling readers.

*Some Historical Perspectives on the Reading Specialist*

Unfortunately, there is little current research reported in the literature related to the roles of reading specialists in the Canadian school context. So, in order to begin the conversation about reading specialists and their place in the education plan of children, I needed to look to the U.S. literature.

The International Reading Association (2000) contends that the place of the reading specialist is a diverse and complex space that has shifted and changed over time in response to expanding knowledge and shifts in political priorities. Today, the number of reading specialists in the U.S. is relatively large as a result of federal government programs dating back to the 1960s. A statistical report cited in Quatroche, Bean and Hamilton (2001) found that in the mid-1990s, one quarter of schools in the U.S. had certified reading specialists in the building. Although education is the responsibility of individual states in the United States (as with the provinces in the Canadian Federation), the federal government has attempted to encourage more national goals through its ability to provide special funding. The government has been able to manipulate curriculum goals through regulations and requirements attached to the disbursement of the special educational funding.

Beginning in 1965, the U.S. federal government offered a program for compensatory reading instruction under the Elementary and Secondary Education Act (ESEA), with its largest program generally referred to as Title 1 (Dole, 2004; Walmsley & Allington, 1995). The funds were for schools, not programs, and were originally earmarked for schools with large numbers of poor children, as

economic disadvantage was seen as a primary cause of reading and school

difficulties. Title 1 teachers were hired to work mainly one-on-one or in small

groups with struggling readers. Primarily pull-out programs (students left their

regular classes to work in small groups with specialist reading teachers), the

instructional content was often different from that taught in the regular classroom,

so the most struggling and needy of students were expected to adjust to two

different classroom environments, approaches and expectations (Allington &

Walmsley, 1995; Bean, Grumet & Bulazo, 1999; Dole, 2004; Quatroche, Bean &

Hamilton, 2001). Criticism over the effectiveness of this practice, along with

changes to political ideology about education in the federal administration has,

over time, led to changes in education legislation. However, all subsequent

legislation has maintained the provisions aimed at making education more

equitable for poor and educationally disadvantaged children.

In the 1981 version of the legislation, Title 1 was changed to Chapter 1,

but the program's foundations remained substantially the same. The 1994 version

prompted the use of Title 1 again and, although still focused on the poor and

educationally disadvantaged, this time it included some fundamental shifts in

philosophy and practice. This version stipulated that the Title 1 students be

assured the opportunity to achieve equally high standards as other students, that

the instruction and curriculum structure be based on effective teaching and

learning, that the decision on actual practices be devolved to local authorities, that

there be accountability ties to state standards and assessment, and that schools,

parents and communities form closer partnerships for the implementation of practices (Anstrom, 1995).

The latest form of the ESEA, enacted in 2000, refined the 1994 version, bringing it into line with the political doctrine of the senior administration (as supported by the contested Report of the National Reading Panel). While the goal of improving the reading and academic achievement of all children remained the same, stipulations on how that would be done (the determination of what would be federally funded) shifted (Dole, 2004). The three stipulations imposed by the government Department of Education stated that programs must demonstrate that all teachers were highly qualified to teach reading, that reading instructional strategies and programs used were scientifically based (according to a narrowly defined interpretation of "scientific basis"), and that "effective and efficient informal assessment techniques should inform instruction and assist teachers in monitoring the progress of each child" (Dole, 2004, p.463).

Within the teaching profession, the result of this evolving legislation has been an ever-increasing pool of reading specialists, and an ever-evolving picture of remedial instruction programs. The pullout programs still exist, but because of the evidence of limited progress, some schools have opted for alternative approaches. These include several different models of in-class remediation approaches, where the reading specialists and classroom teachers work together, with varying success depending on the personalities and school leadership. Bean, Grumet and Bulazo (1999) suggest that there has been a real change from the historical role of the classroom teacher as the primary source of the

developmental reading program, with the reading specialist as supplementary

instructor working independently of the class program.  Now, the roles of the

specialist range from assistant, to the classroom teacher, to integrated

collaborator, with planning and instruction constructed jointly, to the two teachers

working completely independent of one another (Bean, et al., 1999; Dole, 2004;

Jaeger, 1996; Quatroche, et al., 2001; Tancock, 1995). With the emphasis on high

quality first instruction in the 2002 No Child Left Behind legislation, the most

recent incarnation of the reading specialist is one of mentor and collaborative

education consultant (Dole, 2004).

A more recent trend has been towards the use of reading coaches (IRA,

2004), who may or may not be teachers or have much specialized training.

Concern over the potential problems for children has led the International

Reading Association to issue guidelines on the kinds of qualifications the coaches

should have. The trend of using minimally trained people to assist those

struggling with reading and writing worries professionals concerned with

ensuring that all children learn to read.  The practice is contradictory to the

teacher research mentioned earlier, that struggling readers need the best-qualified

and best quality teachers (Dole, 2004; Quatroche et al., 1998; Voyt & Shearer,

2007). Walmsley and Allington (1995) point out, "we know that enhancing the

quality of instruction is critical in accelerating reading development, but remedial

and special education students spend substantially more time with minimally

trained paraprofessionals than do children who experience no difficulties" (p.23).

Bean (2004) explains that the term 'coach' is sometimes used to refer to a

teacher who works with children to help them become proficient readers, and

sometimes it is used to distinguish an expert reading teacher whose job, along

with the tasks and roles of working with students, is also "responsible for

providing support and guidance to teachers, so that the classroom instruction for

students is effective" (p.97). The concept of coach is often connected with the

support provided to novice teachers or following the introduction of a new

method or strategy in a district or school. However, Bean further points out that

coaching will only work if the teacher being coached is ready for the change. A

challenge for the reading specialist is in trying to enthuse reluctant participants.


*Roles of the Reading Specialist*

Because of concerns over professionalism, adequate training and

experience in the ranks of reading specialists in the United States, the

International Reading Association (IRA) established a commission to review the

literature on the roles of the reading specialist. This commission unearthed a

complicated picture of teachers defined as "specially prepared professional(s)

who ha(ve) responsibility (e.g., providing instruction, serving as a resource to

teachers) for the literacy performance of readers in general or struggling readers

in particular" (Quatroche, Bean and Hamilton, 2001, p.282). What they found

was a diversity and complexity of tasks that were dependent on the context of the

teaching (see figure 1.). Expanding the IRA's original three roles of instruction,

assessment and leadership (IRA, 2000), they found the roles fell into six main categories:

1. Instruction

2. Assessment

3. Resource/consultant

4. Leadership

5. Collaborator

6. Student advocate

Figure 1 (Quatroche, et al., 2001) illustrates how the six roles are then subdivided further into other component parts. Instruction, unquestionably the original ground of the reading specialist, continues to be the most commonly identified task of the specialist, but has evolved through time, just as have the teaching methods we think appropriate to help struggling readers.

As discussed earlier, in the current ESEA legislative climate, assessment has taken on a new significance, as the government departments funding special programming require greater accountability and adherence to pre-established standards.

Reading specialists are now counted on to provide guidance for the development of formal assessment instruments that are derived from local program goals, and that are relatively reliable and easy to administer. They assist classroom teachers in interpreting the outcomes and provide suggestions for instructional direction to classroom teachers. Furthermore, since the federal funding agency requires that there be ongoing informal assessment of

Figure 1: Role and Responsibilities of
Reading Specialists
(Quatroche, Bean & Hamilton, 2001)
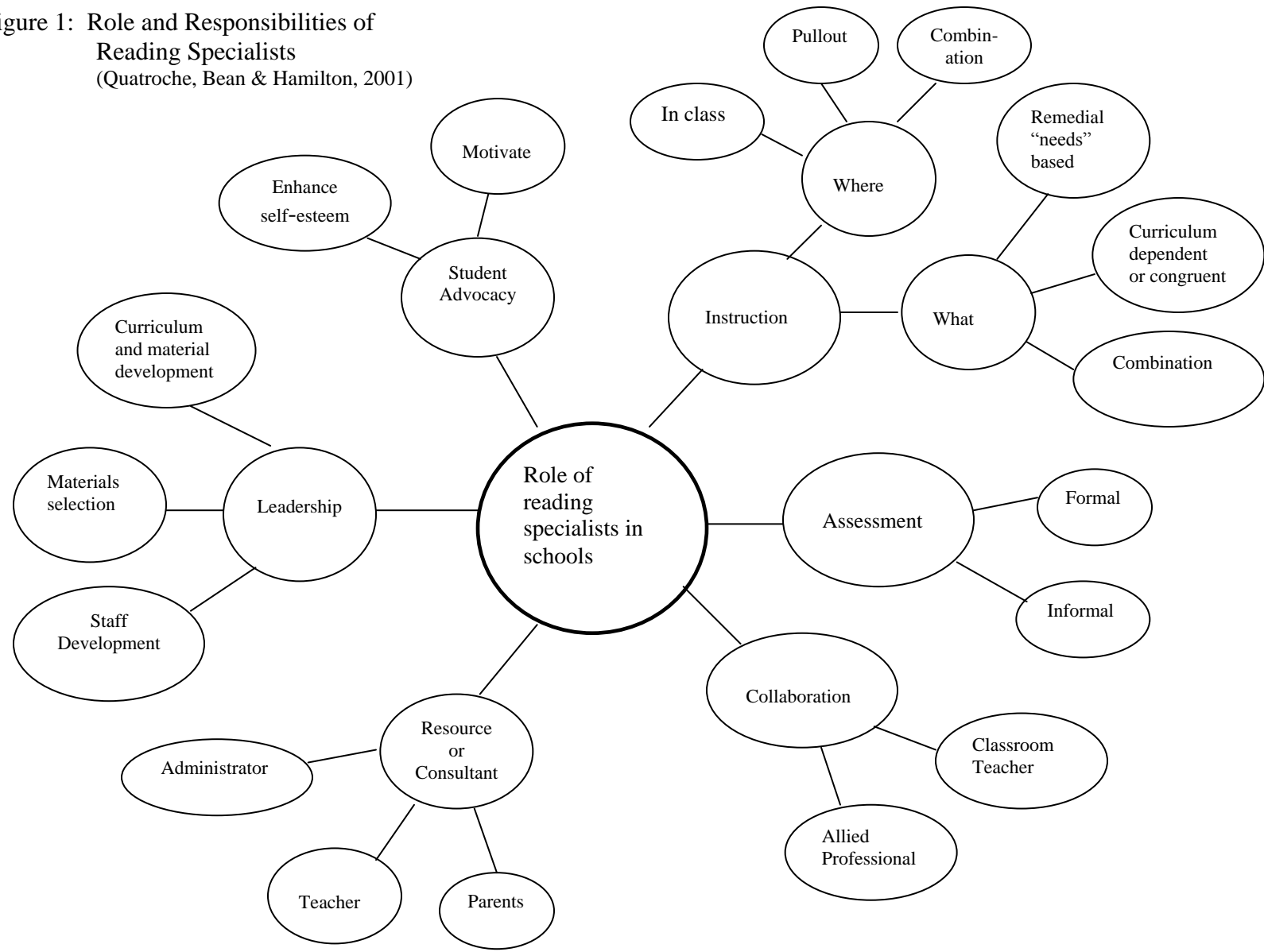
reading development, the reading specialists must also help fellow teachers to effectively engage in this informal assessment of the students in their classrooms (Quatroche, et al., 2001)

Leadership roles for reading specialists have taken on a new significance in this era of accountability. When given the opportunity by supportive administrators, the specialist can assist in the design, development and selection of curriculum materials. But more importantly, the reading specialist can act as a catalyst for the creation of quality, meaningful professional development opportunities that can support the goal of the school as well as the classroom teacher.

To these original three roles, Quatroche, et al. (2001) have added three more roles for the reading specialist that relate to interactions with the whole school community involved in the education of children. The resource/consultant, collaborator and student advocate all require the reading specialist to be adept at dealing with and communicating with the people most affected by the system. As collaborator, the specialist must work with classroom teachers and other professionals (psychologists, speech pathologists, and so on) involved with the school to ensure that children get the best quality interventions. As consultant to the administration, who are often unfamiliar with reading theory and instruction, and to parents, it is the reading specialist's job to present professional information that is often needed to counter popular cultural myths about instructional practice. As student advocate, the reading specialist must take on the toughest task of helping poor readers see that they can learn to read and that reading can be

entertaining as well as a source of information (Bean, 2004). More and more, it would seem the reading specialist is expected to take on leadership responsibilities and other added roles (Jaeger, 1996).

*Reading Specialist as Teacher*

In spite of additional responsibilities, studies continue to show that the most widely agreed upon task for the reading specialist is that of instructing struggling readers. The Bean et al. (2002) survey of members of the International Reading Association who call themselves reading teachers found that over 90% of those responding said they instructed children on a daily basis, with two-thirds spending a majority of their time on instruction. Reading specialists were still most often expected to take on the role of teaching children with difficulties, either in pull out programs or in the various in-class modes. In either setting, for intervention to be productive, collaboration between the reading specialist and the classroom teacher is paramount. Good collaboration is facilitated by good communications within a clearly defined structure, and it is usually up to the reading specialist to make this happen (Bean, 2004). In a study which followed reading specialist interns into their placements, Bean, Grumet and Bulazo (1999) and Bean (2004) identified five categories of collaboration between the classroom teacher and the reading specialist: major/assisting, where one teacher (either the classroom teacher or reading specialist) has the responsibility for instruction while the other moves around the room assisting individuals; parallel teaching, where the two teachers prepare together and then deliver the same lesson to two groups;

station teaching, where the two teachers divide the teaching tasks and prepare for and/or teach their assigned pieces while the students move through the stations; support teaching, where one teacher is responsible for the instructions and the second works with small groups needing extra support (following the plan of the primary instructor); and team teaching, where two teachers plan and deliver lessons together in a whole class setting. Each of these collaboration scenarios provides the advantage of two teachers working with a class of learners, but each also has potential problems or dilemmas that test the collaboration capabilities of the teachers involved.

The presence and role of the reading specialist in the American context is certainly well established in the school system. Reading specialists' situations vary from place to place, but the literature provides a comprehensive view of their roles and responsibilities. In Canada, however, there is no body of literature exploring the practices of reading specialists.

The Alberta Perspective on Reading

In Alberta, the climate for teaching reading is different from that in the U.S. Similar to the U.S., the Canadian Constitution Act assigns responsibility for education to the provinces. Although the Canadian federal government sometimes contributes funds to education projects, it is unlike the U.S. central government in that it does not exert the same influence on the education agenda through large funding programs. Some of the federal initiatives in the past decade have included initiatives to provide for equal access to technology and some

curriculum development projects, funded through departments such as Health, or

Agriculture, or INAC (Indian and Northern Affairs Canada), or through the

Western Canadian Protocol initiatives (originally an attempt at rationalizing

curriculum across the country, but only the western provinces decided to

proceed).  The Alberta provincial Ministry of Education determines the provincial

curriculum, and provincial education funds are distributed to schools through

school district administrations according to site-based formulas.  How funds

designated for student remediation are spent is generally the responsibility of the

individual school principal, with guidelines from both the district administration

and the government departments.


*The Reading Specialist – Alberta Style*

As discussed in Chapter 1, the title of reading specialist is not an officially

sanctioned one.  Reading specialists are generally considered to be individuals

who have completed a Master's in Language and Literacy Education with the

diagnostic assessment of reading and writing.  The diagnostic courses offered at

the University of Alberta are based on a model of diagnostic teaching.  Walker

(2008) describes diagnostic teaching as "the process of using assessment and

instruction at the same time to establish the instructional conditions that enhance

learning" (p.4).  She goes further to describe how the diagnostic teaching cycle

involves both constructivist strategies (a cognitive view) and social constructivist

strategies ("learning is socially constructed *within situations*, not as a result of a

situation" (p. 4)).  Alberta Education has long adopted the diagnostic teaching

model as a foundation for student assessment in reading (Alberta Education,

1986) . The initial assessment is meant to be based on observations of the child

reading in the classroom context and focuses on the child's strengths in making

meaning of what he or she reads. Testing that follows the initial observation is

informal and intended to identify the processes or strategies the child uses to

construct meaning. At the graduate level, students in diagnostic reading and

writing assessment courses are expected to be able to apply a variety of

techniques (such as miscue analysis and the analysis of aided and unaided recalls)

for analyzing reading and writing, again with the purpose of identifying strengths

rather than focusing on weaknesses. (C. Leroy, personal communication, March

22, 2009).

     The larger student populations in urban areas allow the school district

administrations greater opportunity to establish positions for curriculum

specialists to support teachers in the classrooms.  However, with fewer student

enrollments, many of the smaller districts do not have the funds needed for such

specialists (B. Stangeland, personal communication, April 2004).  Where there are

specialists in rural areas, their jobs are made more complex because of the vast

geographic regions they are expected to service, and the periods in the year when

weather can make travel treacherous.

     Another difficulty districts outside the metropolitan areas face is the dearth

of available reading specialists.  Teachers in the city are more able to access

evening courses and attend university part-time to complete Master of Education

degrees.  So, in the metropolitan areas, trained reading specialists can be found in

regular classroom teaching environments, as well as in resource rooms in schools and in consultant positions at the district level.  Districts outside metropolitan areas often rely on experts from outside the area to provide short term, in-service workshops, a form of professional development that has proven ineffective in creating lasting positive change (Cooter, 2003; Routman, 2002).  The task of assessing struggling learners, which is best performed by the reading specialists, must be left to contractors (often with a psychology background, rather than a literacy education one) or attempted by teachers who do not have the background to analyze what the child is doing and therefore cannot determine the specific remedial help required by the children.

It would seem that, although Canadian teachers with reading specializations are educated in many of the same techniques and theory as their American counterparts, differences in educational organization, mostly mediated by political and fiscal realities, result in the reading specialists' roles in Alberta looking different than their American counterparts.  Generally, reading specialists in Alberta can be placed into two categories, district Language Arts/Reading Consultants, and classroom or resource room teachers, situated in schools.  These two categories can be further broken down into other important leadership tasks, but the many roles are decidedly secondary in both time commitment and perceived importance to the main tasks involving teaching.  Figure 2 plots the Alberta reading specialists' role using the same basic model as the Quatroche, et al. (2001) diagram (Figure 1).  The scale is smaller but the picture is as complex.

The diagram in Figure 2 represents the situation for the school jurisdictions with the exception of times when special initiatives originating with the provincial Ministry of Education provide funds for an enhanced focus on reading instruction. Districts can use these designated funds to release classroom teachers to provide professional development to others. This is particularly true since the introduction, in 2000, of the Alberta Initiatives for School Improvement (AISI), a program designed to help school districts find ways to improve the academic performance of students (Alberta Education, 2008).

With each AISI cycle lasting three years, the program is now in its third cycle. School districts were expected to submit new projects with each new cycle. In the first cycle, approximately one-third of the projects cited literacy improvement as the goal, and in the second cycle approximate 30% fell into the Language Arts and Literacy classification, with another 23% listing all core courses including Language Arts (Alberta Education, 2008).

According to the project reports (Alberta Education, 2008), school districts usually managed their AISI programs with an overall supervising coordinator as well as specific project coordinators or lead teachers who were responsible for implementing the plans outlined in funding request proposals. As a result, teachers with advanced education in language arts and reading were given the opportunity to use their expertise to provide leadership, and to gain recognition for their efforts.

Figure 2:  Roles and Responsibilities of Reading Specialists – Alberta Context
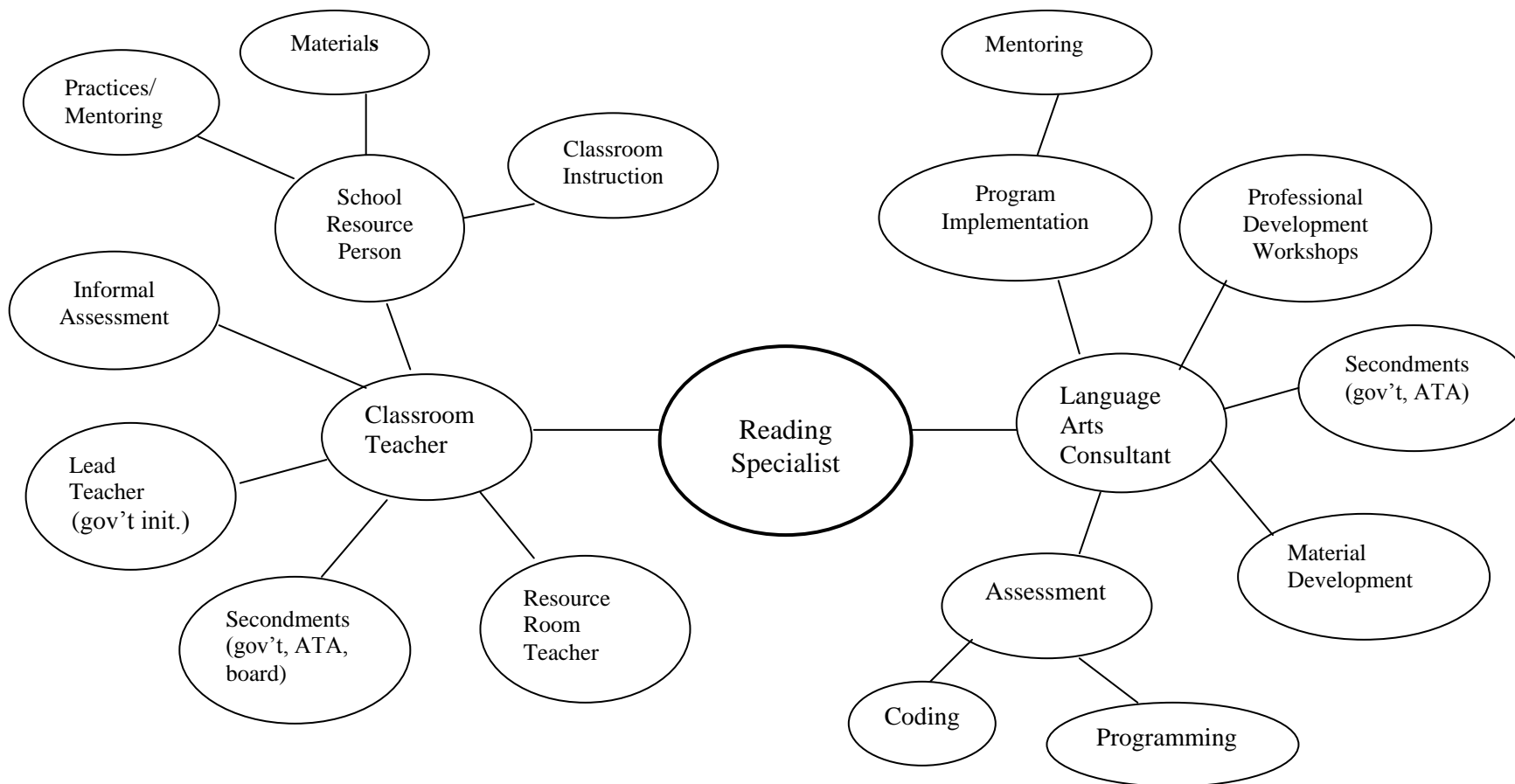
In a study commissioned by Alberta Learning (2004) to review the qualitative reports and promising practices of the first three-year cycle of AISI, a key finding was the positive effect AISI had on professional development for teachers: "universally echoed are positive testimonials to the educational growth opportunities AISI has provided for teachers to work together" (Alberta Learning, 2004, p.14). The project proposal and reporting functions forced groups to work together for common goals and recognize common needs for professional development.  Two important practices commonly mentioned in reports were the opportunities AISI funding provided for teachers to work collaboratively to plan for instruction and to create materials that could be shared.  Another major feature noted was the extensive use of mentors and lead teachers to provide guidance for others involved with the projects.

Building Teacher Leadership Capacity

The professional development opportunities that were created through the projects were seen as a key component for the success of Cycle 1 AISI projects (Alberta Learning, 2004).  The researchers reported a fundamental change in the typical professional development process that was common prior to AISI; that is, experts, both local and external, providing the one-off workshop with little or no follow-up.  With AISI, the professional development took on the characteristics of professional learning communities, where groups of teachers with commonly established goals came together to explore new ideas, theories, teaching methods and practices which they then attempted to put into practice in their classrooms.

Individuals, primarily novice teachers or experienced teachers who took on new teaching challenges, were coached or mentored by more knowledgeable or highly trained teacher colleagues through a process of modeling and supported practice. Mentors and coaches were then available for further consultation if difficulties arose. In situations where reading or language arts achievement was the focus of the projects, the better trained teachers, including reading specialists, were often given the opportunity to take on leadership roles. In some cases, AISI provided the first opportunity for the reading specialist teachers to demonstrate their knowledge and be recognized for their ability to build teaching capacity in reading instruction. Although instructional capacity building was not a stated goal of AISI, it appears from the report on the first cycle to be a significant outcome: "it was as if an informal lead teacher or mentoring model emerged even when not planned that way" (Alberta Learning, 2004, p.18).

The recognized importance of the professional development possibilities of AISI was reflected in the research review of collaborative professional development compiled from reports on the first two AISI cycles (Taylor, Servage, McRae and Parsons, 2006). In their review of other reports and research on several aspects of the Cycle 1 and 2 AISI projects, the authors found common characteristics of successful projects. These included:

- regularly scheduled, job-imbedded time for teacher collaboration

- a common culture of action research and shared inquiry

- significant leadership support at school and district levels

- empowerment of participants and ongoing professional growth of

  teachers

- a clear and shared focus on the goals of student learning (p 5)

In the second AISI cycle, the inclusion of professional development from the

planning stages of many projects meant that teacher leadership was tapped and

supported for the first time.  The program review for the second cycle (Alberta

Education, 2008b) made a specific recommendation, stating:

> Professional Development – School authorities should provide opportunity
>
> for focused and sustained staff professional development that focuses on
>
> improving student learning through achievement of project goals.  This has
>
> the greatest potential for transforming practice.  All staff should be involved
>
> in professional development that is collaborative and meaningful. (p. 88)

This list of characteristics of teacher leadership capacity building evident

in the AISI report and studies is reminiscent of the work of theorists investigating

education reform and renewal (Sergiovanni, 1992; Fullun, Bertani, & Quinn,

2004).  The ideas of leadership capacity development are a key part of a larger

movement to change the way schools work in today's society.  According to this

new view, leadership is no longer thought of as a personality trait and a skill of a

leader, but instead, as a process of learning that is shared among teachers.

Lambert (2003) suggests learning and leading are intertwined, "to be human is to

learn, and to learn is to construct meaning and knowledge about the world that

enables us to act purposefully" (p.423).  Coining the term "Constructivist

Leadership", Lambert and her colleagues framed leadership in an education

community as the process where participants could inquire together and "construct meanings that lead toward a shared purpose of schooling" (p.423). Through an interactive process of "meaning and knowledge construction, inquiry, participation and reflection" (p.423) teachers can experience personal and professional growth, and change in the system.

The notion of constructivist leadership comes from the philosophical stance of John Dewey, an early 20th century educator who had a significant influence on educational theory (Walker, 2002). Dewey believed that learning is socially constructed. He contended that understanding democracy and learning to live in a democratic way was the purpose of education. He, therefore, believed that children need to learn to be self-directed and inquiring. "Dewey's ideas regarding the centrality of student experience to the learning process have informed the evolution of the theory of constructivism" (Walker, 2002, p. 29). He also believed that teachers should have a determining role concerning curriculum, instruction and student assessment.

Dewey's constructivist ideas were further developed by Piaget, who saw learning as a process of constructing and reorganizing knowledge through a sequence of developmental stages, and later by Bruner (1986), who added to the developmental stages the notion that learning is a process of making sense through the learner's social, cultural and historical background. Bruner also introduced the ideas of Vygotsky to educators in the west, thus adding the importance of the social construction of knowing.

Applying the principles of constructivism and social constructivism to school leadership, Lambert (2003) holds the position that it is not productive to continue to think that school leadership must be relegated to those with authority and power in the school. Given the appropriate climate, leadership is practiced by everyone when the need to solve a problem or address a concern is identified. Through the skilful inclusion of others in the dialogue of problem solving, participants become pulled into the work of leadership, thus creating a reciprocal participation process, and a leadership capacity that can be sustained through time. In some cases, such as in the example of the reading specialist, the more expert person can come forward and work with a group of teachers to solve the problem or address a mutually identified concern. The outcome is that not only is a problem solved, but also by working closely with other teachers in this reciprocal environment, the others come to recognize their potential to be problem solvers and therefore assume leadership roles in developing and changing individual and school practice. Lambert concludes:

> Skilful participation in this work of leadership is more likely to result in a learning community, for educators who learn from each (sic) are more likely to lead …. Hence a learning community is at the heart of a high leadership capacity school (p.426).

However, there is also a significant body of literature on teacher leadership potential that is fairly unified in its understanding that creating leaders from classroom teachers is fraught with difficulty (Little, 1988; Wasley, 1991; Lambert, Collay, Dietz, Kent & Richert, 1997; Fullan & Hargreaves, 1996;

Hargreaves & Fink, 2006; Donaldson, Johnson, Kirkpatrick, Marinell, Steele & Szczesiul, 2008).  Many researchers agree that the problems stem from the culture of teaching that holds that teaching is inherently egalitarian.  It's acceptable for teachers to demonstrate mastery and be recognized for their talents within their own classrooms, but not to use that recognition to "assert authority" (Donaldson et al., p. 1091).

The literature also implicates two other norms, seniority and autonomy, as impediments to the support of teacher leadership in school change.  In a recent study of mid-career teachers who had been administratively assigned instructional change leadership roles, Donaldson et al. (2008) found that teachers' attempts to provide leadership for instructional change were often met with hostility and envy on the part of those unwilling to accept leadership from colleagues.  As a result, the designated leaders played down their expertise, worked only with those with an expressed interest in changing their practice, or presented themselves as supports and resources available upon specific request.  They summarize:

> Collectively the norms of egalitarianism, seniority and autonomy have
> impeded the establishment of roles that label certain teachers as more
> accomplished than others, that appoint them to leadership positions
> without regard to seniority. And that grant them a say in colleagues'
> classroom practice (p. 1091).

Wasley (1991), in her study of teacher leaders, comments, "classic definitions of leadership generally agree that 'leaders' enable their colleagues to do things they wouldn't ordinarily do on their own to improve their professional

practice" (p. 4). However, she also notes, "traditional leadership opportunities for teachers are extremely limited and generally serve an efficiency function [of existing systems] rather than a leadership function" (p. 4), and that "regular teachers in regular schools have little opportunity to influence or change set practices" (p. 5). Wasley notes, however, a growing movement toward opening the door to new leadership possibilities for teachers to shape the practices and process of instruction throughout their schools. She concludes, "Teacher leadership … means that teachers work with teachers and focus their time and energy on the investigation of challenging instructional strategies" (p. 170). In order to do this teachers must be permitted to decide which strategies to work on, be given the opportunity to develop the theoretical background for understanding the topic and the autonomy to decide how they will actually investigate these strategies with teachers in actual classrooms (Wasley, 1991).

Lambert, Collay, Dietz, Kent and Richert (1997) view leadership in education to be broader than the development of individual teachers, explaining that "to lead is to attend to the learning of those around us as well as to the culture of the whole organization" (p. 12). Lambert et al. contend that in spite of traditional conceptualizations that leadership in education is the purview of administrators (most often male), all teachers are, in fact, leaders. We generally apply this idea to the work teachers do with the children in their classrooms. Building on the idea that "in effective classrooms, adults and children construct knowledge together, develop shared meanings, and are participants in creating a learning community" (p. 98), Lambert et al. believe that "the practicing teacher is

herself a constructivist leader in the school, modelling learning for students and sharing learning with other adults in the school community" (p. 99). Traditional views of leadership prevent most teachers from seeing their roles in this way. Furthermore, not every teacher wants to extend the teacher-leader role beyond the classroom. However, there are those who sustain or rekindle "dreams of making a difference … by engaging with colleagues and working within a professional culture" (Lambert, 2003, p.33).

Summary

The review of the historical roots of reading instruction for the past 50 years presented in this chapter reveals the complexities and ever shifting focuses that have dominated through the years. This overview also shows how educators have moved ahead in their understanding of what it means to read and to be a reader. The discussion provided a context through which I could frame my understanding of the role of the reading specialist in teaching learners, and in providing leadership to other teachers to expand their capacity for high quality instruction for struggling readers. However, the literature also demonstrates that the opportunity for teacher leadership is not solely based on the individual's quality of knowledge, but fraught with challenges and impediments relating to school and teaching culture.

CHAPTER THREE

RESEARCH METHODS

Since there are very few 'reading specialist' or even 'literacy consultant'
positions in non-urban areas of Alberta, I wondered how teachers with a reading
specialization have used their advanced understandings of reading in their
classrooms, schools and districts to help children learn to read. I decided to
conduct a qualitative study to explore the experiences and aspirations of three
teachers with advanced university studies in reading. I wanted to know how they
had used their expertise within their schools and school jurisdictions in working
with students and with other teachers.  In this chapter I will describe my research
paradigm and describe my research methods.

Theoretical Framework

*Qualitative Research in a Constructivist Paradigm*

I chose the qualitative research tradition in which to conduct the
investigation because I felt it best suited the goals of the study and was the
paradigm that reflected my personal beliefs about educational research.
Qualitative inquiry aims to make sense of how everyday society works and how
people make sense of their worlds.  "Qualitative research is pragmatic,
interpretive, and grounded in the lived experiences of people" (Marshall &
Rossman, 1999, p.2).  Merriam (1998) suggests, "qualitative research is an

umbrella concept covering several forms of inquiry that helps us understand and explain the meaning of social phenomenon with as little disruption of the natural setting as possible" (p.5). She goes on to say, "qualitative researchers are interested in understanding the meaning people have constructed, that is, how they make sense of their world and the experiences they have in the world" (p.6). Because I believe teaching, in all its manifestations, is a complex act that is interpreted in many different ways by its participating actors, qualitative research modes provide an effective paradigm to help understand how teachers think about their worlds.

Denzin and Lincoln (1994) posit that:

Qualitative research is multi-method in focus, involved in an interpretive, naturalistic approach to its subject matter. … qualitative researchers study things in their natural setting, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them. (p. 2)

As the field of qualitative research has evolved, Denzin and Lincoln (2002) have further refined their ideas to state,

Qualitative researchers stress the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry. Such researchers emphasize the value-laden nature of inquiry. They seek answers to questions that stress *how* social experience is created and given meaning. (p. 8)

Defining or situating one's research within the qualitative field is not a simple task, as it is an ever-evolving field of multiple perspectives. Many authors

of texts intended to assist researchers in understanding the parameters (Patton, 2002; Creswell, 1998; Marshall & Rossman, 1999; Merriam, 1998) identify a web of different typologies, genres, paradigms and/or traditions. In the 2000 edition of the *Handbook of Qualitative Research*, Denzin and Lincoln reiterate the notion that qualitative research has "no theory or paradigm that is distinctly its own" (p. 6). Such research is multi-paradigmatic where all methods and practices used towards the investigation are of equal value. They continue, "(t)he field sprawls between and crosscuts all of the human disciplines, even including, in some cases, the physical sciences" (p. 7).

To help me situate my research in a belief structure, having considered other authorities on the subject, I turn to Guba and Lincoln (1994, 2000). They suggest that researchers develop their inquiry based on three constraining elements that are the product of a personal perspective of the researcher, "a framework (theory, ontology) that specifies a set of questions (epistemology) that he or she then examines in specific ways (methodology, analysis)" (2000, p. 18). They contend that all inquiry is fundamentally a "human construct" (1994, p. 108); in other words, the results of inquiry are:

> simply the most informed and sophisticated view that its proponents have been able to devise, given the way they have chosen to respond to the three questions … they are all inventions of the human mind and hence subject to human error. No construction is or can be incontrovertibly right. (p. 108)

It was my intention in this study to gather the experiences and perspectives of the participants, to filter them through the screen of the research question, and with

the assistance of the participants, construct an understanding of the professional experiences of non-metropolitan classroom teachers with a reading specialization. Thus I hoped to answer my primary research question: What are the professional experiences of classroom teachers with a reading specialization in non-metropolitan school districts?

Guba and Lincoln (2000) identify five general paradigms of inquiry, positivism, post positivism, critical theory and related positions, constructivism, and participatory approaches. Since I am interested in understanding the meaning or reality as constructed by participants (Merriam, 1998), this study fits most logically in the constructivist paradigm, characterized by Guba and Lincoln (1994) as relativistic (constructed realities that reflect the perceptions of the participants), transactional (findings created through the interaction of investigator and participants), and hermeneutical/dialectical (constructions "elicited and refined only through interaction *between and among* investigator and respondents" (p. 111)).

### *Role of the Researcher*

Qualitative research is first and foremost described as naturalistic, in that it takes place in real world settings where the phenomena under study are able to unfold naturally (Patton, 2002). In order for the unfolding to occur in this manner, the researcher must be in close contact with the situation under study, and in fact, become personally involved. It is important to remember in qualitative research that the researcher is the primary instrument of the research

(Patton, 2002) since he or she is personally responsible for the collection and analysis of the data and therefore able to respond to situations to attain the best quality and quantity possible. But as Merriam (1998) points out, this human involvement can also be a liability with possibilities for inaccuracy and misconceptions. Ellis (1998) comments that the researcher must come to the process "with openness, humility and genuine engagement" (p. 18). Genuine engagement is important in gaining the confidence of the participants as well as in providing the sustenance to keep the researcher in the research space for what could be an extended period. In fact, Merriam suggests that qualitative inquiry requires that the researcher have certain characteristics, the primary one being a tolerance for ambiguity, since there are no absolutes and the researcher must be prepared to pursue meaning. She characterizes qualitative research as "plac(ing) the investigator in a largely uncharted ocean … an adventure full of promise for discovery" (p. 21). Some people, however, find it a "disorienting and unproductive experience" (p. 21). The concepts of tolerance for ambiguity and lack of absolutes was a comfortable fit with my personality and personal beliefs about the complexity of the act of teaching.

I also needed to be mindful of the reality that I come to my research question with a personal history and experiences that shape my perspectives about what I 'know' (fore structures and subjectivities). I was aware that my path to 'knowing', though initiated in a similar way to that of the participants, led through adult reading development rather than children's. Since adult literacy is as much a political discussion as an academic one, my work in the field sensitized me to

the social justice aspects of learning to read. My sense that literacy acquisition was more than a matter of finding 'the' right way to teach was heightened by working with literacy learners in Aboriginal communities in northern Alberta and the Northwest Territories.  In addition, teaching English as a Foreign Language to learners  in China provided opportunities for me to develop additional perspectives on language and literacy development.  Because these life-shaping experiences were so different from those of the participants in my study, I knew that in order to ensure meaningfulness and consistency in the study, it was important for me to be aware of the context of the participants' work in my interviews with them, and also in my analysis of the data.   I remembered how my thinking had been shaped, and I recognized that others had approached their knowing from different perspectives. This understanding helped me to bring together the divergent paths of my life and those of the participants.

J. Smith (1993) speaks of our ability to see only to the limits of our horizons - the defining edges of our prejudices or subjectivities.  With each new experience, this edge adjusts to assimilate the new information.  Being open to the perspectives of others does not mean that we have to change our own.  Smith clarifies, "it is not a matter of abandoning one's own standpoint and grasping that of the other.  On the contrary, a dialogic encounter of questions and answers is a fusion of horizons" (p. 196).  By acknowledging my subjectivities and identifying where they are situated in my interpretation, I feel that I was able to present an honest representation of the stories my participants shared with me.

*Interpretive Inquiry and Hermeneutics*

It can be argued that all inquiry is interpretive also. Qualitative, constructivist inquiry necessitates that the researcher engage a hermeneutic/dialectic role in determining a meaning for what people do (Guba & Lincoln, 1994).  Hermeneutics, by definition, is a conversation (D.G. Smith, 2002), without which "we live with a sense of isolation from one another" (p. 187).  This means that the created picture of the 'reality' of a particular group of participants in an interpretive study is a construction of the researcher, in conjunction with the participants as they jointly interpret the data.  In order to create this reality, using hermeneutic methodology, the researcher and participants need to engage in a process of analysis that continually revisits and questions the meaning of data as more and more is revealed or uncovered.  Using the uncoverings, the researcher returns to the participants for more information, which then leads into more uncoverings, and thus is created a circle or spiral with ever-deepening understanding of the 'reality'.

The recursive constructs of the hermeneutic circle of interpretation require a focusing on the parts in order to understand the whole, while stepping back to look at the whole to identify the wonderings that lead to the questioning of the parts (J.K. Smith, 1993; Schwandt, 2000).  It is through this questioning that researcher and participants construct a meaning that is not the definitive end, but explains a piece of life in a specific situation, at a specific point in time. Patton (2002) emphasizes that a hermeneutic theoretical framework reinforces the ideal that qualitative inquiry is an interpretation, not an absolute truth, " The meaning

of a text, then, is negotiated among a community of interpreters, and to the extent that some agreement is reached about meaning at a particular time and place, that meaning can only be based on consensual community validation" (Patton, 2002, p. 114).

Trustworthiness, Credibility, Transferability and Confirmability

Judging the quality of qualitative, interpretive, constructivist research is sometimes viewed as problematic, because it does not follow the practices of positivistic research that has been the norm in science during the modern era (Guba & Lincoln, 2000; Packer & Addison 1989; Patton, 2002).  So rather than speak of validity and reliability when referring to the rigor of the research, as positivists do, various authors have developed other language to discuss the quality of the work of qualitative, or as Denzin and Lincoln (2000) refer to it, new-paradigm inquiry.  Depending on the perspective of the authors, they have evolved slightly different typologies to discuss quality judgments.  For the purpose of this work, I have selected to explain my efforts at ensuring quality through Guba and Lincoln's (p.13) language of trustworthiness, credibility, transferability and confirmability.

A significant part of the discussion of trustworthiness is bounded in the notion of what constitutes "truth" in qualitative research (Packer & Addison, 1989; Guba & Lincoln, 2000; Patton, 2002).  Generally, the authors in this field contend that there is no one single truth in any investigation.  Guba and Lincoln (1994) write, "the constructivist paradigm assumes a relativist ontology (there are multiple realities), a subjectivist epistemology (knower and subject create

understandings), and a naturalist (in the natural world) set of methodological

procedures" (p. 13-14). In their later work (Guba & Lincoln, 2000), go further to

explain that constructivists:

> refuse to adopt any permanent, unvarying (or "foundational") standards by
>
> which truth can be universally known … truth – and any agreement
>
> regarding what is valid knowledge – arises from the relationship between
>
> members of some stake-holding community … Agreements about truth
>
> may be the subject of community *negotiations* regarding what will be
>
> accepted as truth. (p.177)

Trustworthiness in qualitative research is not measured against an

established or predetermined external criterion, but by how wholeheartedly the

interested constituency is involved with creating meaning from the research

undertaking. Patton (2002) suggests, "constructivists embrace subjectivity as a

pathway deeper into understanding the human dimensions of the world in general

as well as whatever phenomenon they are examining" (p. 546).

The process of diligently constructing a meaningful documentation of the

study was instrumental in lending credibility to the outcome. It represents one of

Patton's (2002) three elements of credibility, rigorous method. Another element,

the credibility of the researcher, could be considered a weakness in the overall

execution of the study, as I had limited experience. Since I recognized this from

the start, I found it important to represent myself to my participants as

knowledgeable about reading theory and empathetic to their experiences, so that

they could develop confidence that what they shared would be treated with

intelligence and dignity.  Patton's third element of credibility, the philosophical

belief in the value of qualitative inquiry, I believe to be self-evident in the design

of the whole study, and further reinforced by the fact that all of the participants

were also proponents of qualitative research approaches, as demonstrated in their

own graduate studies research, and therefore very willing to engage with me in

the process of creating meaning.

On the issue of transferability, it was important for me to consider the

"high quality lessons learned" (Patton, 2002, p. 564) from the experiences of the

participants.  My interpretations, derived from the analysis of the data, verified

and further shaped in discussions with the participants and in feedback from

professional colleagues, gave me confidence that others reading the research

outcome could find meaningful lessons that they could apply to different

situations.

The quality issue of confirmability remains problematic. As identified

earlier in this document, I entered into the research with certain perspectives and

subjectivities that influenced my understanding of the data.  By relying on

extensive reference to examples from the actual words of the participants, I hoped

to show how I arrived at my interpretations and ultimate conclusions.

Participants

In order to investigate my research question, my plan was to identify four

or five teachers working in literacy instruction in non-metropolitan school

districts in Alberta, who either met the criteria for membership in the Northern

Alberta Reading Specialists Council, though not necessarily members, or had

similar academic education from institutions other than the University of Alberta. These criteria included:

- Diagnostic reading and writing remediation courses – e.g. University of Alberta EDEL 508 and 509 "Diagnosis and Remediation of Reading and Writing Problems I & II"

- Theories and philosophies of reading – e.g. University of Alberta EDEL 505 "Theory and Practice in Language Arts"

- Completion of other language arts and research courses towards a Master of Education degree.

I sought out participants in non-metropolitan areas of the province because the smaller districts, at a distance from the major urban areas, are not as able as metropolitan districts to fund specific reading specialist positions. Therefore, the experiences and opportunities for the teachers with a reading specialization may be different from their metropolitan counterparts. I suspected the dearth of specialist positions and teachers with reading specializations in non-metropolitan areas was likely to have an impact on the role those with the expertise were able or required to take on in their schools or divisions. Ericson (1995) identified that, although rural educators often have the advantage of lower student-teacher ratios, a high degree of autonomy, and closer relationships with the whole school community (colleagues, parents and the greater community), they are also disadvantaged by professional isolation and multiple duties and expectations across the school environment. Given these urban/rural differences, I anticipated that participants who work in small, non-metropolitan districts might have had

more comparable experiences in their professional lives than similarly educated teachers working in urban settings.

The selection of the participants was based on a purposeful sampling (Patton, 2002; Merriam, 1998), where researchers can select "information-rich cases" (Patton, 2002, p. 230) in order to gain in-depth understanding, rather than create generalizations. I hoped to receive sufficient information from the participants to develop a picture of the ways in which teachers with reading specializations in non-metropolitan areas found their expertise being used. I was expecting to find a 'typical sample' of teachers with a reading speciality (Patton, 2002; Creswell, 1998). Patton explains a 'typical sample' as one that provides a picture of what is typical about the group being studied.

### *Finding Participants*

As I was developing my study and refining the question, I knew that finding participants to fit the criteria might be a challenge. My experiences in working outside urban areas informed me that there were very few teachers with further education in reading instruction in the communities where I had worked, and fewer still who had undertaken graduate level studies in reading. I realized, however, that my knowledge of teachers' backgrounds was limited. I needed informants who were more familiar with the teachers in the school jurisdictions I was targeting. My former employment had enabled me to develop a relationship with the school superintendents and senior central office administrators in the areas where I had worked. My plan was to make initial contact with the school

jurisdictions' central office administrators to find out if indeed there were teachers in their schools with the background I was seeking. Knowing that privacy regulations might prohibit school authorities from providing me with the names of individuals, my next planned step was to ask the administrators if they would allow me to send out a general request to all the schools in their district, outlining the criteria for participation and requesting volunteers. I hoped to attract three to five potential participants.

To my disappointment, the Superintendents were unable to identify any individual teachers who met the criteria. Only one senior administrator knew of such a teacher but she had retired at the end of the previous school year. As this was in a smaller community in which I had once lived, I knew of the teacher, and was able to obtain contact information through her daughter. My initial contact with the retired teacher, Sadie (pseudonym), was a telephone conversation, in which I was able to use my acquaintanceship with her daughter to initiate a relationship. Sadie expressed an interest in the project and agreed to participate.

Realizing my initial plan presented a problem in locating sufficient participants, I decided to broaden my search boundaries to include a wider geographical area, while retaining a non-urban teaching environment. I decided to use my informal network of informants, that is, my professional colleagues who were members of the Northern Alberta Reading Specialist Council. My inquiries led me to two individuals in non-urban districts. To obtain contact information, I searched them out through their school jurisdictions' websites. My initial contact with the individuals was through an e-mail message in which I briefly identified

myself, the nature of my study, and requested permission to contact them by phone for further discussions.  Both responded positively, and the relationship began, first by phone and later through a personal visit, during which I further developed the relationship, along with addressing the research ethics requirements for informed consent.  Bernard and Artie (pseudonyms) were employed in different school divisions in rural settings.

Having experienced difficulty in identifying three participants, I decided three would be sufficient for the purposes of the information I wished to gather. My limited success in finding participants required me to bend my criteria slightly. The primary change was that none of the participants were currently classroom teachers. Although all had begun their careers as classroom teachers, all were, or had recently been, engaged in providing programming for struggling readers and/or supporting teachers to deal more effectively with reading instruction. Sadie had designed, and for several years implemented, a pull-out remedial program for struggling readers in her Kindergarten to Grade 3 school. Bernard was a Reading Recovery teacher and teacher trainer in his school district. Artie had for several years worked with Early Literacy Initiatives and other literacy improvements projects. Each of the three participants worked in different districts.

Data Collection

The primary source of data for this study consisted of multiple individual interviews with the participants.  Patton (2002) identifies three approaches for

qualitative data collection: informal conversational interview, general interview

guide and standardized open-ended interview.  I mainly used the informal

conversational interview approach because, as Patton says, "(it) offers maximum

flexibility to pursue information in whatever direction appears to be appropriate"

(p. 342). However, because I had a few specific questions I was curious about, the

interviews could more aptly be described as taking a combined approach (they

included some structured questions).  Immediately following each interview I

prepared reflective notes to record my recollections of non-verbal nuances that

were evident in the interviews.  Reviewing the audio tapes immediately after the

interviews further aided my recall.  In my reflective notes I also recorded my own

connections, questions and sense of perplexity that each encounter generated.

Patton speaks of this as "quality control to guarantee that the data obtained will be

useful, reliable, and authentic" (p. 384).


*Interviews*

Patton (2002) contends, "qualitative interviewing begins with the

assumption that the perspective of others is meaningful, knowable, and able to be

made explicit" (p. 341).  Through interviews, we hear other people's stories from

their own perspectives and in their own voices.  However, Patton emphatically

warns, "*the quality of the information obtained during an interview is largely*

*dependent on the interviewer*" (original emphasis, p. 341).  Seidman (1991)

further notes, "listening is the most important skill in interviewing" (p. 56).  As is

the case with many novice researchers, one of my greatest concerns was that I

would not be able to conduct interviews that would get to the heart of the topic.

By considering Seidman's three levels of listening - the first, listening to what the participant says; the second, listening to what is not said (Seidman suggests the public voice is not telling untruths, but rather is guarded); and the third, listening to maintain a consciousness of the procedural and personal aspects (for example: time, personal energies, breadth of topic coverage) – I hoped to sustain conversations that would provide quality data.

I interviewed each of the participants separately on three different occasions. To prepare myself for the first interview, I brainstormed a list of questions based on what I was particularly interested in. From that list I selected four questions I considered broadly based, that I hoped would open the discussion but not limit it. The questions were, for example:

1. How would you describe your career as a classroom teacher and as a teacher with a reading specialization?

2. Describe your experience of taking graduate courses in reading? Why did you decide to take them? What effect have your graduate studies had on your teaching and career direction?

3. What have been your roles since completing the reading specialization courses?

4. What do you think your role in the school and the district ought to be in the future?

My hope was that these broad questions would open the door to a broader conversation about the past and present features of each participant's teaching

career, and to open space to hear how they viewed their continuing place in their school jurisdictions. The final question was not relevant for Sadie, who was retired and therefore not looking ahead to her teacher roles. Instead, I asked her to speculate on what she would have wanted her career to look like, had she not retired.

The initial interviews took place in a location of the participants' choosing and were audio recorded for later transcription. Following each interview, I prepared the written transcripts from the audio recordings in order to conduct a second interview based on perceptions/observations developed from contemplating the initial interview. I found I had many additional questions and points upon which I wanted further clarification. I also shared each transcript with the participant, to ensure that they were comfortable with the level of disclosure they had shared in our first informal conversational interview. As expected, all found the transcripts surprisingly lacking in oral fluency, but all stood by what they had initially shared.

Despite several pages of questions generated from my reading of the transcripts of the first interview, the second interview with each participant continued as the first had, with the participant taking the lead, and with me following with questions for clarification. We were able to delve more deeply into how participants viewed the course of their careers, and what their hopes were for the development of leadership in reading instruction in their school jurisdictions. I referred to my written questions only when the participant's conversation lagged. The audio-recorded sessions were again transcribed.

The first two interviews were conducted within weeks of one another, but the third interviews did not take place for another year. This was partly due to personal circumstances, but it was also because I wanted to see what would happen in the professional lives of the two participants who were still working. The work assignments of both Bernard and Artie were mediated by provincially funded Alberta Initiative for School Improvement (AISI) initiatives that operated in three-year cycles.  The second of these cycles was about to end. This meant that school jurisdictions needed to submit new proposals for AISI funding to support new activities. Stipulations for this funding required that activities for the new cycle be different than the focus in the previous cycle. I suspected this could impact the nature of my participants' work and I was interested in continuing our conversations after the impact was felt.

My third interview with Artie confirmed my suspicion that the changing AISI initiative would change the nature of her work. This interview proved far ranging in its content and for that reason, I decided to not transcribe verbatim, but rather to capture a more narrative version of the conversation. Bernard also had experienced a change in his work, though to a lesser extent that Artie. I decided a further interview with Sadie would be somewhat redundant, but did want to share with her some of my thoughts, so I made another visit, the record of which was included in my personal reflections.

*Reflective Notes*

Throughout the process of collecting and analyzing data for this study, I maintained a reflective notebook. Patton (2002) identifies the importance of these notes as a record of the "context for interpreting and making sense of the interview later … . This is the beginning of analysis, because, while the situation and data are fresh, insights can emerge that might otherwise have been lost" (p. 384). As well as reflections on the process, the notebook also served as a place for me to release my emotional responses to the frustrations and concerns expressed by the participants. Far from being a detached, neutral and invisible operative in the research process, my reflections provided a space for very personal involvement with my participants and helped to define my subjectivities, offering potential insights into my place in the evolution of the interviews. Fontana and Frey (2000) explain:

> Researchers are not the mythical, neutral tools … Interviewers are increasingly seen as active participants in interactions with respondents, and interviews are seen as negotiated accomplishments of both the interviewer and the respondents that are shaped by the contexts and situations in which they take place. (p. 663)

At times I was surprised by the depth of emotional engagement I experienced as I listened to my participants speak and joined in their excitement, triumphs, frustrations and disappointments. The emotional energy sustained my thoughts and resulted in detailed journal entries, in spite of the fact that I had to travel for

almost two hours after each interview before being able to complete the journaling.

<div align="center">Data Analysis</div>

Qualitative data is analyzed as it is collected. Meaning is developed as it emerges from the data. In order to frame the questions for future interviews, data should be analyzed as soon as possible (Patton, 2002). Bogden and Biklen (1992) liken it to building a picture puzzle where the picture is not previously known. The picture emerges as the pieces are collected and maneuvered into places where they seem to fit. In fact, at the beginning of the research, the researcher does not know what all the questions are, and therefore cannot always recognize the answers until the whole picture is carefully studied. The image of building a puzzle without knowing what the picture really looks like was an important consideration in my approach to qualitative research. I knew it was imperative that, in spite of my fore-structures, that is, my previous knowledge and personal biases, I needed to keep an honestly open mind to the paths the data led me down (Ellis, 1998; Patton, 2002).

Creswell (1998) writes that in qualitative, interpretive research "data analysis is not off-the-shelf; rather it is custom-built, revised, and 'choreographed'" (p. 142). Patton (2002) echoes this sentiment and goes on to admonish "no absolute rules exist except perhaps this: Do your very best with your full intellect to fairly represent the data and communicate what the data reveals given the purpose of the study" (p.433). He further cautions that it is incumbent on the researcher to fully disclose his or her procedures and processes.

My holistic analysis of the data was ongoing throughout the evolution of the study. Since the theoretical framework of the methodology for the study was grounded in hermeneutic inquiry, the analysis was characterized by this stance. Hermeneutic analysis, as I used it in the study, is predicated on the notion of a circle or unfolding spiral (Ellis, 1998). Using the metaphor of the circle, the forward arc, or projection, is the action of making sense of the inputted information, from both the perspective of the researcher, but also the participants. I moved forward through the arc as I reviewed the initial transcript, absorbing the participants' stories as they first presented them. The backward arc, completing the circle, is the action of seeing what might not have been said, or what could have been missed, " the data are reexamined for contradictions, gaps, omissions, or confirmations of the initial interpretation" (Ellis, 1998, p. 27). During the data collection process, the arc backward renewed the forward arc, as this was where the new questions based on the previous understandings were asked and explored. With each repeated reading of the transcripts, I attempted to understand what the participants were saying either explicitly or implicitly. This led me to further questions that I sought to explore with the participants.

The result of the ongoing interaction with the data was many pages of transcribed interviews, as well as reflective field notes. Both Creswell and Patton suggest that the best way to tackle the vast quantity of data collected in qualitative research is to gather it all together and read it over several times to gain the 'big picture'. Patton (2002) identifies the process of taking the data from the analysis of the 'big picture' to identifying recurring patterns and themes within the data as

content analysis.  Since this is a slightly controversial use of the term, Patton emphasizes, "content analysis is used to refer to any qualitative data reduction and sense-making effort that takes a volume of qualitative material and attempts to identify core consistencies and meaning" (p. 453).

I began my data analysis by reading through the data to develop a coding scheme (Creswell, 1998; Patton, 2002). While doing this, I was cognizant of Creswell's advice to keep the number of codes to a manageable size (20 to 30), so that the later task of contracting is not too overwhelming. Once codes were established, I read and reread the data again, applying the codes to the appropriate sections, adding to or refining descriptions of codes to further assist the coding efforts.  Patton suggests that the starting point of analysis is to look for convergence or "recurring regularities" (p. 465) from which categories can evolve.  He advises to think about judging by two criteria, "internal homogeneity and external heterogeneity" (p. 465).  By this, he means how items are similar to one another (what makes them members of a category), and how they differ (what makes them members of a different category). The discovery of patterns, themes and categories is referred to as inductive analysis (Patton, 2002).  The data from each participant was considered independently, however, my initial passes through the transcripts were also designed to acquaint me with an emic analysis of the participants' language and practices that identified them as members of their particular group – teachers with a reading specialization (Patton, 2002). Patton suggests that qualitative investigators need to consider the indigenous understanding of the participant group members if they are to be able to create the

classifications (typologies) that truly reflect the experiences as the participants themselves understand them.

Once coding was completed, another copy of the transcripts was produced and like-coded excerpts from each participant were collected together. This aided in the efficiency of the next step in analysis, the reduction of codes to more manageable thematic units or patterns. Patton (2002) cautions, however, about the danger of creating an analysis that is framed more by the researcher's understanding of the world than that of the researched participant and therefore suggests that the constructions be presented to the participants to "find out if the construction makes sense to them" (p. 460). At this point, I created an overview of the themes and patterns I was seeing in the data, and presented them to each participant, soliciting critiques of the path I was venturing on.

The analysis stage is only the beginning of the struggle to construct meaning from the situation being studied. The next step was interpretation to glean the larger implications of the study, to make sense of what was found through the collection and analysis of the data. Patton (2002) defines interpretation as "going beyond the descriptive data. Interpretation means attaching significance to what is found, making sense of findings, offering explanations, drawing conclusions, extrapolating lessons, making inferences, considering meanings, and otherwise imposing order on an unruly but surely patterned world" (p. 480). The process included dealing with data that offered the counter examples, inconsistencies and irregularities.  Patton summarizes that this process will "(1) confirm what we know that is supported by the data, (2)

disabuse us of misconceptions, and (3) illuminate important things that we didn't

know but should know" (p. 480). To ensure that I remained true to the purposes of

the study, I ensured the study questions were kept close by me. I also continually

questioned myself with the consideration of what the data meant to tell me and

others.  From this emerged the stories of these three teachers.

Qualitative research is ultimately grounded in language that is used to

present our interpretations of the findings. Making the transition from thick

description to thick interpretation, Patton (2002) argues that it "in part, connect(s)

individual cases to larger public issues" (p. 513). Although "thick description",

that is, description that is deep and rich, tends to be associated with ethnographic

research designs, Patton considers it a necessary condition for constructing the

meaning of the broader picture.   However, he also reminds the researcher that

qualitative inquiry requires critical thinking to guard against the traps of faulty

logic or circuitous arguments. The key to such interpretation is the creative nature

of the process and the skill with which we use language to communicate our ideas

(Ellis, 1998).


Ethics

In order to comply with the University of Alberta's Ethics Review

procedures, at the initial meeting with each participant, I provided a written

explanation of the study along with a description of my obligations and

participants' rights and protections under the University of Alberta Standards for

Protection of Human Research Participants. I asked participants to sign a

document verifying that they had been fully informed and they had consented to participate. As well, at the beginning of each interview, I reaffirmed the participant's willingness to continue. All remained interested throughout the research process. I also requested that participants select a pseudonym in order to maintain their anonymity. All documents concerning informed consent were stored in a safe place in my home.

Limitations and Delimitation

This study was limited to a specific definition of specialized reading teacher within a specified geographical situation.  The results of this study were limited to the experiences of the participants interviewed and defined by the limits of their willingness to disclose these experiences to me, within the time structure of the study.  Furthermore, the limits were framed by my ability to portray and interpret the participants' stories.  They are delimited to these individuals' experiences, and are not intended to be generalizations applicable to other specialized reading teachers in non-metropolitan settings.  The individual understandings of the participants' experiences are not intended to be transferable, but the lessons that can be derived are designed to provide insights into how reading specialists might be able to contribute to reading instruction within non-metropolitan school districts.

CHAPTER FOUR

THE LIVES OF THREE "READING" LEADERS

Introduction

Finding three specialized teachers of reading, beyond the urban school

districts, was a challenging task. However, once I found them, I supposed that

since they had very similar training, and their teaching environments were similar

in that they were situated in small school districts in rural towns, their approaches

to using their knowledge of reading instruction would be relatively similar. As I

came to know the participants in the study, I realized how very differently each of

them approached their work. All three were passionate about helping children to

become better readers, but just as they differed significantly in personality, they

envisioned and actualized their work in different ways. In spite of differences, the

career paths of all three seem to narrow to a similar destination none would have

predicted.

Sadie was a newly retired teacher, who, as a result of disappointments and

failed attempts to assume leadership roles, came to identify strongly with working

independently to help individual children. Borrowing from Britzman (1984), I

identify the style as the *Rugged Individualist*. Bernard had a soft-spoken, gentle

manner that might, to the casual observer, mask his deep commitment to helping

other teachers come to question and closely examine their teaching practices in

order to improve their skills as teachers.  I identify Bernard's style as *Leading from Behind*.  Artie was a woman passionate about sharing her knowledge of reading instruction with other teachers to help them help their students.  Artie's style I identify as *Leading from the Front*.

<div style="text-align:center">Sadie: The Rugged Individualist</div>

Sadie began teaching at the age of 18.  She spent more than 40 years devoted to working with young children.  Now, in retirement, the passion for teaching still rings in her voice.

For several years, Sadie and I had lived in the same small community. Teachers with reading specializations are not commonly found in non-metropolitan regions, so it would seem likely that two people with similar education backgrounds should know one another.  Curiously, we had never met.  I had certainly heard her name mentioned and had met a family member, who was also a teacher.  But Sadie's path led her to work with young children in need of reading support, and my work was with struggling adult readers. Looking back, I feel sad that fate did not intervene to precipitate our meeting.  Our development as reading professionals had commonalities in perspective, philosophy and practice and I wonder what we might have been able to do together to foster literacy in our community.  The hours I spent visiting with and interviewing Sadie were lively, interesting and packed with humour, as well as with some bitterness.

Like many who choose teaching as a career, Sadie had dreamed of being a teacher from a very young age.  She began our interview with this story:

I'm a person who wanted to be a teacher since I was four years old.  I fell

in love with my kindergarten teacher.  I loved the way that her dress fell

on the floor around her as she sat on the little chair to read stories to the

class.  And so I spent my whole school career working towards being a

teacher of small children. Fortunately I did go to teacher's college, did get

a scholarship, and did become a teacher.  I began to teach at 18 years old –

that was in 1962.  And I figured then that I'd teach forever.  So here I am,

62 years old and I've just retired.  I devoted 42 years to this goal that I had

since I was a child.

Arriving in Canada as a young teacher, Sadie had already experienced

some recognized success in her teaching career.  She was on track toward being

the youngest school principal in her home region.  Her enthusiasm and ambition

were driving forces in her life.  In spite of her drive to advance her career, she was

also open to adventure, which was how she found herself with her young family

in a rural northern Alberta setting.  The administrative fast track she had been on

at home came to an end.  In her new life, initially intended to be a temporary stop

on a broader adventure, she taught in primary classrooms in different locations in

the school district, following her husband, whom she felt was more highly valued

as a teacher leader. With a touch of irony, she commented, " … they really

wanted the *capable young man* (Sadie's emphasis) – they weren't much interested

in me, of course!  This was northern Alberta!"  It seems that subtle gender

discrimination was to plague Sadie throughout the rest of her career.

*Taking the Lead*

Within a couple of years of coming to Canada, Sadie found an opportunity to use her background in primary school to step into a leadership role. The provincial government, through Family and Children's Services, began to implement kindergarten programs for all children. Although these programs were not part of the school's mandate, the districts were asked to provide coordination. The coordinator, a teacher, was required to promote the program to parents for voluntary participation, and to supervise the untrained paraprofessionals hired to work with the children in the different communities. Sadie explained, "There was no money to pay teachers to teach kindergarten, so we had to hire unqualified people. So basically, I was the teacher for three kindergarten programs." Sadie, along with four other coordinator/teachers spread throughout the district, was expected to conduct information meetings, visit the homes of preschool children in the large, sparsely populated area, and set up appropriate classroom environments and developmentally appropriate programs for the children. For parents unwilling to send their children to the school, she also set up home kindergarten programs. She commented "We did everything we could to try and get children involved." The program allowed for autonomy and creativity, conditions under which Sadie flourished. She summarized the experience in this way:

It was very exciting because we were building something very important.

I had some really scary experiences (with parents) but we got through it

and our program flourished. And at the end of the three years it was the thing to do, to send your kid to kindergarten.

Her positive, forceful, yet supportive personality allowed her to successfully interact with the parents and to provide the kind of leadership the classroom workers needed. Within three years, the government brought the kindergartens under the mandate of the Ministry of Education, and school districts began to hire qualified teachers for the kindergarten classrooms.

For many people who voluntarily leave their homeland, there remains the desire to return, and this was the case for Sadie. Her children were maturing and the family decided it would be a good idea to return to their home country so the children could complete their high school years there. What Sadie failed to consider was that her experiences in Alberta had changed her ways of interacting with the players in the learning environment. Although she was immediately hired to teach, she soon found herself in trouble because of her forthright practice of dealing directly with parents, instead of following the appropriate channels through the school administration. She quickly came to realize that the system in her homeland was too restrictive for her expanded notions of the roles and responsibilities of teachers. Following the completion of the school term, the family returned to Canada, and was welcomed back to their old school district.

*Expanding Literacy Understanding*

The next chapter of Sadie's career was structured by her husband's new school location as he continued to climb the ladder of school administration. The

move brought her to the school environment that best complimented her teaching style, and nurtured her need to extend her own knowledge. She commented,

> I realized that the principal was not a creative person, program-wise, but she didn't stop me from being creative. I was the kind of person who could never teach the same program for three years. I had to change it, and I mean dramatically change it. I loved the creativity. I loved the way (the principal) allowed me to be the best that I could be.

The primary school Sadie landed in was to be her teaching home for the rest of the 25 years of her career with the exception of the years she spent extending her knowledge through university graduate studies. Here she built a highly respected reputation in the community for knowledgeable teaching, and empathetic support of children, particularly those struggling with reading and writing.

Throughout her career, Sadie saw herself as a maverick. Surrounded by what she considered to be "very traditional teachers", she distinguished herself by introducing and adapting ideas gleaned from professional journals and other reading. But she also maintained that much of what she did was the product of intuition. She summed up by saying:

> More than anything else, I think I relied on my own sense of what was happening – I felt a great respect for viewing the process; analyzing the process and seeing how the process could be comfortably improved for the benefit of this child who didn't benefit from it today.

She introduced practices like daily journal writing and having Grade 1 students writing stories from the first day of school, uncommon practices in the early 80s.

Inspired by an earlier mentor, who was untiring in her pursuit of children's books for the classroom, Sadie also believed in providing children with lots of opportunities to read real children's literature, not just the stories in the basal reading series commonly used in the school.

Sadie characterized herself as being highly analytical. This meant that she "built the program every night according to what happened today – there was no projection for the next week." The more she succeeded with children, the more analytical she became, particularly for these children who did not easily experience success with learning to read and write, "I could get so far, but I didn't know how to diagnose the problem and so that's what I wanted to do." The desire to deal diagnostically with children's reading difficulties led to Sadie's first experience with graduate studies, a Masters program in reading, with an emphasis on diagnostics and remediation in reading.

While in graduate studies, Sadie discovered she "loved university". She quickly discovered that what she had been practicing in her classroom was reflected in the emerging literature in literacy instruction. She realized that she had been incorporating the practices of what was beginning to be called Whole Language before it became a trend in education. She remembered:

> In the first week of university I kept coming across this thing called 'whole language'. The more people described it, the more I recognized it as what I had developed – what had grown out of common sense applications of what was needed, layer on layer on layer. I had actually created a fully functioning, exciting learning cooperative. I saw so many

striking similarities in the literature to what I was doing and why I was doing it, I recognized my voice and my philosophy and my beliefs in the whole language literature so completely that I felt like I'd come home.

Ironically, although she felt she knew a significant amount about diagnostic work from her clinical studies, she still did not feel she knew how to teach reading. As is typical of curious people, the more answers Sadie had, the more questions she had to ask, "With the diagnosis it still wasn't enough because you still needed to have a lot more knowledge and understanding of why children were having difficulties with reading." For Sadie, it meant further study; this time the psychometric correlates of reading, and of course, more questions.

As a result of her professional studies, Sadie became the reading specialist for the school. She was moved from the Grade 1 classroom to the resource room. The principal again left Sadie to develop the kind of instruction she felt most appropriate for the needs of the students. Sadie acknowledged, "when you get a creative person, and you put them in a situation where they are allowed to do the things they can, without people trying to squeeze them into any predetermined mold, amazing things happen." The necessity and privilege of having the autonomy to do what she thought was best for her students was a recurring theme in Sadie's discussion of her success.

In spite of her focus during graduate studies on diagnosis and assessment, Sadie remained skeptical about the usefulness to the classroom teacher of the kind of information available through these measures. She steadfastly resisted the labeling of students, which she cited as the primary purpose of the diagnostic

assessments (Alberta Diagnostic Reading Program) she had learned to conduct, and for a short time, a service she provided in the school.  Although recognizing that school authorities need to have designations of 'learning disabled' in order to access funding, she eventually decided that she could not, in good conscience, provide the service.  Rather than use the assessment measures as specified by their publishers, she would select samples from the various assessments she felt relevant to the particular student:

> I guess I broke all the rules.  If a child came with a specific type of problem, first I needed to diagnose what the problem was.  I'd take a little bit of this and a little bit of that; and I'd take the memory from Binet [the IQ test] and use a little of something else, and I'd take little bits of everything until I figured out what the problem was.

Her knowledge of the child and the classroom instructional situation gave her particular insights that could not be measured by the diagnostic tools.  She felt it was 'the big picture' that was important.  She dubbed it "diagnosis in Adidas, you know, running through the classroom and you've got it, you can hear it and you know straight away and you can intervene to give a heads up to a parent or teacher and keep moving."  Rather than have the school or district administrators refer children to her for special help in reading, she would take requests for investigations from teachers.  Once fairly certain about the problem, in her capacity as resource room teacher, she could work through some interventions with the students until she felt that they had caught up with their classmates and no longer needed the additional help.

Because her methods could have been considered by parents to be somewhat unorthodox, Sadie identified, as a significant part of her work, the need to keep parents informed. Experiences from the kindergarten program made her aware of the importance of having the parents on her side. She also knew that some parents would understand right away, while others would take in the information at a meeting, but only have questions after they had more time to digest the information. Sadie made herself available to parents, and opened her classroom to anyone who wished to observe what she was attempting to do with the children.

Through the years in the resource room, Sadie used her knowledge and analytical nature to develop school-wide programs aimed at improving the overall reading and writing ability of every child. After testing the whole school for language proficiency and finding significant deficiencies, she introduced a program aimed at language development that focused on helping children expand their spoken vocabulary. Then she engaged the whole school in a project to encourage students to read more, and to have parents read with their children regularly. To capture the students reading practice, Sadie created the Reading Cottage, where, after reading a book, the children could place their names on small pieces of colorful paper to be placed on hand drawn murals of favourite characters or scenes from well-loved stories. Every year the children read hundreds of stories and completed the murals. Sadie recounted:

> The children's parents were coming into the school with visitors from
>
> home to show them Johnny's name on Peter Pan. It was so important. I

walked down the hall one day and just smiled.  There was a man there,

who would have scared you on a sunny day; he was all covered in chains

and hooks and rings and things.  And he looked like he had fallen off his

motorbike.  And there he was going along on his hands and knees, going

along the bottom of one of these looking for his child's name.

 The murals have been preserved and today adorn hallways in the school where

Sadie taught.

As discussed previously, Sadie did not choose to use her training to do

many formal assessments, but she would go into classrooms when invited by

teachers to make observations about students causing the teachers concern.

Experiences told her that many of the difficulties these young children

experienced were relatively similar.  It was a matter of isolating the main

difficulties and planning interventions with the teachers that would be meaningful

and useful.  When more than classroom-based remediation was required, Sadie

brought the students into her resource room pull-out program for additional

remedial help.  She was quite clear that her program was additive, providing

intense, complementary instruction.  She explained to the teachers, "you have

your program going, and I'll just dig around the roots with some of these kids and

give them extra nourishment."  Over the years, she worked with different

configurations of group instruction but eventually settled on an instructional

model that involved intense, limited duration, one-on-one interventions. Sadie

trained a team of up to four paraprofessionals to work with the children.

Interventions, which she termed 'boosts', were targeted to the specific needs of

the individual child. Once students appeared to be performing on a parallel with their classmates, the students would rejoin the class. Recognizing that reading progress was often impacted by outside influences, as well as what occurred in the classroom, students who fell behind again could be picked up for an additional 'boost' when required.

To mitigate the loss of time moving from one classroom to another required with pull-out programs, Sadie and her helpers had their brief boost encounters with students in hallways, cloakrooms and other immediately convenient spots. In this manner, Sadie and her team were able to provide intense, regular, individualized interventions for many children. Those children needing "a little" help received it in a timely manner, while those needing more in-depth interventions were able to receive it in small, incremental steps, while still benefiting from whole class instruction with their regular teacher. She also encouraged home engagement in helping struggling students, encouraging the children to read their stories at least three times between sessions with her. Sadie's ability to connect with parents and enlist their support, honed in the kindergarten recruitment days, was an important asset in the remedial program.

Sadie's perspectives on children's abilities to learn and the strength of a one-on-one program were based on her firm belief in what she termed "the power of learning". She recognized that even young learners "had a lot of disappointments and a lot of bad experiences" related to learning. She believed that working with students in groups diluted the potential of the learning experience, but that through one-on-one interactions she could foster "more

powerful" experiences for the children. Even though Sadie's one-on-one teaching was the core of the reading remediation program, her influence on learning in the school also included the whole school project (the Reading Cottage), some work with whole classes, particularly in reference to writing instruction, and some small group work when teachers solicited her help.

*A Leadership Role*

As Sadie's expertise in literacy instruction grew, she was always willing to aid teachers in the school who requested her help. For her part, Sadie was very respectful of her teaching colleagues, willing to share her knowledge with them, but only at their invitation. Having studied theories of teacher change as part of her Master's degree studies, she was aware of the difficulties in effecting meaningful, sustained change in teachers' practices. She believed that "you teach who you are, and what you truly believe is who you are – and if you're not me, you're not going to teach like me." She was more than willing to share her innovative ideas, but was not prepared to impose any teaching philosophy or practice on her colleagues, nor did she expect others to directly mimic the approaches she was sharing:

> I would always tell them to only use the idea as a springboard. As you're trying it you'll see how you would shape it and mould it and make it your own. I didn't see my way as being "the" way. I always saw my way as being the beginnings of a good idea for them, hoping they would take

ownership. The only way to take ownership of something is to shape it –

grow it yourself. That was always my quest.

Throughout my interviews with Sadie, she spoke very respectfully of other

teachers, even those disinclined to change what she viewed as out-dated practices.

Sadie explained her position in this way:

> They (teachers) really don't have the opportunity to try something and fail
>
> because nobody forgives them. How many teachers would be willing to
>
> give up half the year trying something new and having it not work. The
>
> bottom line is that there are too many pressures on teachers to succeed.
>
> The only way that many of them can succeed is by doing what is tried and
>
> true.

Although she did not always agree with how her colleagues worked, Sadie

believed that every teacher had their students' best interest at heart and she was a

passionate defender of teachers' rights to do their job to the best of their ability.

"I truly believe that each and every one of them (teachers) is doing the best they

know how. I never question that teachers leave the staffroom in the morning with

all kinds of good intentions. I never question their good intentions," she told me.

She questioned typical approaches that attempted to change teacher practices

through dictates from central administration, followed by in-service training or

prescribed professional development. She defended teachers' rights to learn from

their own agenda, "I believe that teachers are a group of people who have never

been given the right to learn. They haven't been given the freedom to learn, they

haven't been given the possibility to learn." Her five year Masters of Education

degree program and change in practice led her to believe that, just like children, teachers as adults need to be scaffolded in their learning (Bruner, 1986) and nurtured within their zone of proximal development (Vygotsky, 1986) to be able to learn and effect change.

Her philosophy about teacher change also made Sadie reluctant to write articles that described her successes, as her principal encouraged. However, if pressed by other teachers or school leaders she was willing to talk about her program, or go into classrooms to demonstrate her practices. Although cognizant of the limitations of such activities, she also shared her knowledge in professional development events, and mini teacher conventions sponsored by the school division, where teachers had choices of what to participate in.

In spite of her reluctance to impose her philosophies and practices on others, Sadie did consider herself a teacher leader. With her years of teaching experience and longevity in the district, she was not reticent to challenge notions put forward by administration, as other newer teachers might be. She was also very encouraging of teachers who wanted to attempt changes in their practice, "I was very willing to be a mentor/tutor/help – to demonstrate, model and go into classrooms."

Sadie believed she had a good relationship with her teaching colleagues because, as she said, "I think they truly understood that I really, really valued the efforts they were making, the person they were, the intent that they had, and the work that they put into it." She offered this illustration of how she interacted with teachers who sought her help:

If they wanted me to help them to do it faster, easier or whatever, they knew that I would do what I could. They could come and ask for ideas. "How do you think I could …?" OK, lets brainstorm – what are you going to do and what do you want to see? Some stuff was short term and some stuff was long term. Teachers would say, "I have a problem and I don't know." "What would you like to see the children doing in three weeks?" "I want to see them sitting down, not talking and getting to work." I'd say, "Ok, if that's what you would like to see, then let's see how we can help them to achieve that goal." We'd come up with three, four, five ideas of ways that a teacher might achieve that goal. I'd remind them that they had to remember how learning works and not lose sight of how to work with children. I'd tell them that children are just like us; they're just smaller and less experienced. We know what makes us tick, buzz, smile. Use our knowledge.

Teacher leadership was a very important and active part of Sadie's school experience, but each illustration she described was permeated with the notion that the help she offered was asked for, not imposed. She repeatedly returned to the theme of respect for other teachers when giving examples illustrating points, and even chastised me when my discussion questions appeared to be casting negative attributes towards teachers.

Over the years working in the primary school with the same principal, Sadie became valued for her knowledge about teaching reading and her natural

ability in the classroom. She was sometimes called on to provide generic workshops for teachers and parents. She gave this example:

> I'd just share common sense – little things like, "Miss, will you tie my shoe?" And I'd say to them, "It's the simplest thing for you to reach down and tie their shoes and get on with it. We're busy people and time is short. Think about it, that last time that you did that, where was the child looking? They were looking at your hair, your beads around your neck, or talking to their friend over their shoulder. You're on your knees, tying their shoes and their eyes are everywhere – who's learning something? The person who needs the least practice at tying shoes is getting the most. That's not common sense! So I would model, "Oh, Mary, you need help to tie your shoes. Tommy, you're a good shoe tier, come over here and tie Mary's shoes for her. Mary is going to instantly become a critic. That's the way life is. Mary's not going to be looking around. She is going to be watching every little thing that Tommy does – that's how kids are made. She's going to be watching because she'll say, "Mommy doesn't do it that way." Who's learning now? You take what's real, normal, and ordinary, and you help teachers to see that these ordinary, everyday practical truths can become powerful in helping them with their teaching.

Her principal also relied on her to work with teachers who were less successful in the classroom. When questioned about how she was received by those she helped, she responded that she always felt her colleagues welcomed her

assistance. She attributed this to the atmosphere of the school, which she accredited to the principal:

> I suppose part of it is that you develop such a persona in the school. Everybody in this school was valued and given the room to be the best they could be. Everybody in this school was told that they were valued. When you're in a school like that, nobody is overshadowing anybody. It's a cooperative learning thing. If I've got something that could help you, come and tell me and I'll share it with you. Come and ask and I'll be there for you, if there is anything that I can do. They do come.

Unfortunately, it was in this area of teacher leadership that Sadie found her greatest career disappointments. It seemed that in spite of successes with children, parents and colleagues, she was never afforded the opportunity to take on a leadership role at the district level.

Unlike most small, non-metropolitan school districts today, in the early 80s, Sadie's district had an assistant superintendent of Language Arts. The job was one of supervision, particularly observing and writing reports on new teachers. When the position became vacant, Sadie applied, seeing it as an opportunity to go into classrooms, work with teachers and be a resource to them. "I applied to be a consultant because I wanted to work with and help teachers." She went on to explain, "I believe that if you want to help somebody learn, you take note of where they are, what they're trying to do, and then you help them to achieve their goals. That's the job I wanted."

Unfortunately, the district administration decided to change the nature of the position, making it an assistant superintendent of Elementary Schools, and promoting someone else into the position. She later learned that part of the concern with promoting her into the position had been the fact that her husband was already working in central office, and the administration was reluctant to have the husband and wife working in the same office. Sadie was very disappointed because she had really wanted to work to help teachers, "A lot of my work at university was about respecting teachers and where they were at in their learning." A few years later when the position came up again, Sadie tried once more, but was overlooked in favour of a high school principal with a Physical Education background. This second disappointment left her disillusioned about the value placed on the hard work teachers did within their school and the district. She didn't regret the work she had done, but she questioned the district administration's commitment to helping improve the quality of teaching in the district.

Setting aside personal disappointments, Sadie recognized her good fortune in working in a school that allowed her to excel and provided the environment where she could make important contributions:

I was very fortunate to find a school that valued my need to do things on my own. I introduced all kinds of new ways of seeing teaching and learning, not because I wanted to make others do it, but because I wanted to do it. So I modelled because I was doing it and they were curious. I exposed teachers to other ways of seeing things. They were fascinated. I

went on to learn more and to understand more and with that growing

knowledge, other teachers saw me as their personal consultant. One of the

older teachers called me the professor. So that was valued. The fact that

they had someone like me who was not only very knowledgeable about

reading, but always willing to share, always willing to help, always willing

to take a child from where they were at; never once said no, there's not

room or no time. I would do the dirty or hard work, like when a teacher

was running into a parent with criticisms. I could generally get the parent

to see things our way.

As further evidence of her leadership qualities, Sadie made it a practice to

be inclusive in celebrating children's successes. When students made gains in

achievement through various interventions, Sadie was sure to point out to the

teachers how their hard work in the classroom had paid off. She commented,

You give it back to the teacher. That's one of the reasons it was so

successful, why the teacher never felt threatened by me. Nobody hates

anybody more than they hate Mrs. God Down the Hall. You always give

it back to the teacher.

When outsiders came to see her program, she always made them aware of the

important role the principal played in her success by creating the positive,

successful atmosphere of the school.

In spite of the fact that Sadie possessed the most advanced education in

reading instruction of anyone in the school district and had taught university

undergraduate courses in diagnostic reading, and despite  her innovation and

energy in creating successful programs in her school, and the recognition she

received from other teachers around the district, Sadie was only once formally

called on by the administrators of the district to help advance the quality of

reading instruction in the district.  This was during the introduction of the Alberta

Diagnostic Reading Program (ADRP) in the late 1980s. Sadie was given release

time of one day per week to first be trained and then to provide training for other

teachers in the district in the administration of the ADRP inventory and the use of

the resulting data. Otherwise, Sadie never felt that her knowledge and skills were

valued, and somewhat bitterly commented, "The school division was very much

in the belief that experts always lived 50 miles down the road," even if that meant

paying for expensive consultants. However, she explained that there was never

any budget for a district reading consultant:

> All the time from '85, when I got my diploma in Language Arts, and then
>
> did my Masters in '92, almost with a PhD, with all of this time there was
>
> never any thought given to a reading consultant/specialist.

When asked to speculate on how she believed the school district would have been

different had there been a reading specialist position, she replied:

> Teachers would have been a lot braver at trying new things and attempting
>
> the things that they were hearing about at in-services.  They would have
>
> had a support program at Central Office that said "Yes".  Teachers can't
>
> afford to head off on a tangent alone without a support system.  The
>
> support system has to be administration.  (Teachers) are too vulnerable.
>
> They could afford to.  They're vulnerable to parents who say, "That

doesn't look like the education that I got when I was in school." They're questioned by everybody. It doesn't look like the program in the classroom next door. This is not the way they did it last year. Are these kids going to be ready when they go into Grade 4 next year? Are they going to have the skills? If they had someone in Central Office who said, "Yes, I'll stand beside you, and I'll talk to the parents with you. I'll be there when you talk to the principal. I'll help you in the classroom. I'll talk with you at the end of the day about how it went and how it might go tomorrow." If they had that kind of support system, they would have been braver.

The absence of opportunity to contribute to teacher development in a meaningful way remained a blemish on Sadie's memory of a happy and productive career. She speculated that 'Central Office' likely knew that she would not be prepared to promote policies with which she was not in complete agreement, and this was probably why she had never been given the promotions when they had been available. Like Britzman's (1984) *Rugged Individualist*, behind the closed classroom door, Sadie did what she felt was best for the students, with or without the sanction of those in the district leadership. She went on to comment that 'Central Office' had never been interested in a Reading Specialist position, but instead opted for positions with more generic descriptions.

Sadie's decision to end her 43-year teaching career came with a major change in fund allocations for her resource room program, which would have required her to return to group teaching of struggling readers. The individualized

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program that she had devised and ushered many children through, would no longer  be a possibility.  Sadie felt it was akin to stepping back into the past, and since she had been contemplating retirement, felt it was a good time to depart. Looking back, she reminisced:

> I'm quite happy to walk away from it all. I've done all that I could.  A lot of people were touched, a lot of parents were touched, a lot of lives were changed.  I know they were changed for the good.  People remember there was a teacher - they may not remember my name; they may not remember which teacher but they have good memories of a loving teacher who made it all possible, made it work.  I feel good about that.  Now, I sit on my deck, I watch the ducks on the lake and I'm quite happy.

## Bernard – Leading from Behind

When I first met Bernard, he was dividing his teaching day several different ways, as Reading Recovery teacher for two schools and on special assignment for the district AISI (Alberta Initiatives for School Improvement) Early Literacy project.  He had, at that time, been working as a specialized reading teacher outside of the regular classroom for approximately four years.  At the foundation of Bernard's progression towards specialization in reading was his core value of reflecting on and questioning of his practice.  As a teacher for more than 25 years, he had teaching experiences in a variety of grades and subjects, especially early in his career, but had found his professional home with children in kindergarten and the primary grades.  Bernard began focusing on learning more

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about reading when he experienced struggling grade one students, "I had children who were not learning to read. I became increasingly frustrated and started asking more questions about why that was happening – starting to look at my own teaching rather than blaming the child." He confessed to not really understanding what reading was all about and knew that he needed to know more. The very personal experience of trying to help his own child' struggle with reading further motivated Bernard's drive to discover more about reading processes and strategies in order to be better at teaching children to read.

According to Bernard, his instructional practice early in his teaching career consisted of teaching the letters and sounds, building into words and finally into reading actual text. He realized that this method was not effective for some of his students. So, he then attempted a different approach - a program that emphasized the discrimination of sounds in words. The children were taught a system of symbols and colour codes to distinguish and remember the phonetic sounds. When applying the system in the classroom, he was disturbed to find that in spite of gaining phonological skills in the correct order according to the program, the children's reading was still not fluent and their reading advancement was disappointing. He lamented, "At the end of the program I had kids that could, like being in a circus, do all the tricks, but when it came time to put it together in the text, couldn't do it. I began to realize there was more than this." He explained his belief about children acquiring reading in these terms:

>  It's not about going through the levels (in the program he was currently
>
>  using). It's about reaching a place where children are processing the

information but also incorporating it into who they are. It's a huge

understanding that they have to have, that this reading is figuring out life.

While on a year-long teacher exchange to Australia, Bernard was

introduced to another program for helping children struggling with reading –

Reading Recovery. Reading Recovery is an intensive, one-on-one remedial

program primarily for beginning readers. Rather than teaching the component

parts of reading skills progressing to connected text, Reading Recovery embedded

the acquisition of skills in reading and working with real text. For Bernard, the

focus on 'real reading' was an important distinction.

Once he was back in Canada, resuming his place in the primary grades,

Bernard took the initiative to access training in early literacy instruction being

offered to teachers as a voluntary, after-school activity. Here he was able to learn

about and practice the use of the running record, a tool for assessing the reading

capability of children. The running record was also a key component of Reading

Recovery. Two years later, as Reading Recovery became more popular in the

region, he took the personal initiative to acquire the full Reading Recovery

training. Bernard was now able to use the program as a tool in his own

classroom. At the same time, school administrators keen to find early literacy

initiatives, provided funds for Bernard to institute the program with four children

at a time. This arrangement of part-time Reading Recovery and part-time

classroom teacher continued for another three years, until the district

administration decided that they wanted to expand Reading Recovery for the

young struggling readers in the district, and advertised for a lead teacher who

would be responsible for training other Reading Recovery teachers, as well as coordinate the program. The position would require the lead teacher to take training being offered in the city two hours away. As the only Reading Recovery teacher in the district, Bernard applied for, and was offered the position.

The training was extensive, taking place half of every day for a whole school year. Bernard worked with four children in the morning, and then drove two hours to attend the training in the afternoon. Because of his belief in the efficacy of the approach, Bernard was happy to be working towards bringing it to more children in the district. Furthermore, the training afforded him exposure to the theories that guide the Reading Recovery practice.

Bernard credits his exposure to Reading Recovery in Australia with broadening his perspectives about teaching reading, and the lead teacher training to opening the doors to theoretical perspectives of reading that eventually led to his study for a Master of Education in reading. His initial introduction to university graduate studies was through a credit university course taken concurrently with the Reading Recovery Lead Teacher Training program. As a part-time student, Bernard completed evening, weekend and summer courses, accumulating credits that would eventually complete the requirements for the Masters degree. Even though pursuing more education, he lamented that as he became more knowledgeable about the complexities of reading, the less he "knew" for certain. He further commented that coming to understand a postmodernist approach that took his understanding about reading out of the positivist realm "freed (him) up to consider possibilities." The learning offered in

the Reading Recovery training and graduate studies allowed him to develop an evolving philosophy about children gaining literacy. Although not all children he worked with in Reading Recovery were able to attain grade level in the 20 weeks he had to work with them, what he generally saw was children coming to a realization about what reading really is. He explained:

> It's a huge understanding that they have to have, that this reading is figuring out life. Children don't get to that place when I'm finished with them in Reading Recovery, which only allows me 20 weeks. At the same time, I had teachers come back to me afterwards and say even though this child is not reading really well, she understands when she is wrong if she reads it incorrectly. At least she has the self-monitoring and she knows when she is on the track or not.

As the Reading Recovery Lead Teacher in the district, Bernard was able to not only reflect on the Reading Recovery process, but also on what it meant to engage in a leadership role with teaching colleagues. In considering the process of training other teachers in Reading Recovery practices, he explained that he needed to first be 'the expert' in order to help the teachers take on the techniques and to "be comfortable with all of what Reading Recovery is." Once the teachers had a notion of the theories and techniques involved, he felt that he could then assume a leadership role to move teachers' thinking about reading. He expressed this contrast between the two roles this way:

> I've been thinking about this in terms of the role of the expert, as opposed to the leader. The teacher leader in Reading Recovery can only get to that

leadership aspect of bringing people to a different way of knowing when the expert stuff is dealt with.

He also felt it was very important that the trainee teachers be diligent in using the approach as prescribed, so that the learners had sufficient practice to assimilate the techniques used in Reading Recovery. He based his stance on the concerns over costs that translated to time constraints (each child would only be allowed 20 weeks of Reading Recovery intervention), as well as the possibility of causing significant confusion for the learner if instruction was not systematic. It was not that he felt the program was infallible for all students, but rather, he believed that when teachers question the efficacy of the program for individual students, they should have sufficient background and experience with it to make sound judgments. However, he also recognized that when faced with resistance from some people, it was better to be a little more tolerant of deviations, commenting, "those people who are really resistant relax a bit if the teacher leader is relaxed about it."

The experience with the Reading Recovery Teacher Leader training meant that Bernard entered into the Masters of Education graduate courses with a more advanced notion of literacy and reading theory than many of his contemporaries in the program. Comparisons of the different approaches also created some dissonance. He spoke about struggling with the perspective taken in some of the diagnostic processes he was learning in graduate courses and found some diagnostic practices to be cumbersome and therefore inefficient sources of information about the learner as a reader. The foundation of Reading Recovery

was quick, ongoing assessment of the skill levels and needs of the learners, while the in-depth analysis of reading required in Informal Reading Inventories (IRI) and the correlate assessment tools seemed belabored. He explained, "The kinds of tools you get in the (diagnostic reading course) are based on a positivistic approach. You get the answers to the questions that you are asking. I'm not saying that it's not helpful, but it's just not the complete answer."

What particularly concerned Bernard were the inevitable 'reading disabled' labels school districts assigned to struggling readers who did not perform well on the IRI assessments. It concerned him that for some identified 'disabled readers', when given the opportunity to engage in reading activities with a topic of interest, these children were enthusiastic to participate in reading instructional activities and were able to perform better. Perhaps because of his experience with Reading Recovery techniques, he often found himself at odds with university classmates when evaluating the quality of responses on comprehension questions and retellings. He commented that Clay's theory base, articulated through her development of the Reading Recovery Program, was very broad because of her assertion that reading is a very complex process, not easily quantified. Reading Recovery required continuous evaluation of student progress, offering greater opportunity for more qualitative information about the learner. He suggested that the techniques pursued in the graduate courses were oriented to more empirical, psychological tools and measures. He acknowledged that since most of the graduate students participating in the program were wanting to work

in the metropolitan school systems, they would be expected to have proficiencies with the more psychologically oriented assessments.

For Bernard, working in a small district, graduate studies in reading diagnostics and remediation led down a very different career path than his urban colleagues. The Early Literacy Initiative and AISI funding that allowed him to pursue his Reading Recovery expertise clearly defined a portion of his position (Reading Recovery Teacher and Teacher Leader), but the rest of his full time equivalency as AISI funded Literacy Advisor was less clear. As the AISI kindergarten project evolved, Bernard felt that the definition of his AISI position had moved from that of a top-down leader to more of a facilitator of collaborative discussions. The kindergarten teachers brought problems to the table; the group explored some possible approaches; the teachers tried some strategies and analyzed the effectiveness, then determined what kind of adjustments should be made. He explained:

> We've gone from literacy advisorship to professional learning community. It's almost like the professional learning community, which I see as a healthy thing, has usurped this role of the expert. I see teachers learning in a dynamic learning community as a much better model.

Bernard was able to provide leadership by finding and suggesting professional literature that could provide guidance in the process, thus deflecting the spotlight of expert from himself to others in the field who tested practices and assessed their value.

As Reading Recovery Teacher Leader, he again balanced the roles of expert versus leader when dealing with questions or problems other Reading Recovery teachers were experiencing with their students.  He did not simply dictate answers but engaged in critical problem solving.  He explained,

> I have conversations with them where, together, we're exploring an issue the teacher is having, a situation that the teacher is having where they're trying something and it's working really well, and she wants to talk about it, or it's not working and she needs to talk about it.

He saw the Professional Learning Community (PLC) as a vehicle for everyone in the Reading Recovery group to ask more questions and work together for answers, not just rely on him.

However, Bernard's role of expert was not completely left behind.  In the remaining five-tenths portion of his position that included Reading Recovery teacher, he continued to work with children in two schools.  There, he said, "people come to me as a person who knows something about literacy", and even though it was not technically part of his position, he worked with the teachers to analyze students' literacy difficulties and helped teachers navigate the development of Individual Program Plans (IPPs) for students.  In discussing his motivation and raison d'être, he explained, "You have to resolve that for the teacher; how can you relieve the stress that the teacher is feeling."

Leadership – Guidance from Behind

Along with the official duties as described in his multi-layered job descriptions, Bernard also made a point of keeping informed of initiatives the Ministry of Education was contemplating with regards to achievement assessment and accountability. His idea was to stay ahead of the trends and establish, within the Ministerial goals, an agenda that was of importance to the classroom teachers, rather than waiting for external forces to dictate what should be done. By proposing this approach to his PLC colleagues, he was able to help the group to seize the initiative, in a highly participatory way. When discussing the kind of job that would be his ideal, he commented:

> I like working with teachers on things that are happening in their classrooms. I like helping them to figure out problems – "What can I do better and how can I do it better?" That kind of discussion really excites me. You get this interaction happening. A teacher comes and shares with another teacher what she found out about an experience. I think that's how we learn.

When asked how he prevented the teacher-learning environment from deteriorating to negative conversation about the state of the work of teaching in general, Bernard admitted that he'd had some experiences with such conversations. He felt that it was inevitable and that teachers needed to be able to express these views, but then he would turn the topic back to the group "and then say, 'How can we move on from here. Where are you going to move (the students) next.' – putting the onus back on the teachers." The whole notion of the

teachers setting the agenda for their own learning was key. He used the following

example to illustrate his approach to leading the AISI group:

> First, we need to get to the point of thinking about using data and using the
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> assessment to improve our practice. There has to be open minds to try
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> new things. We need a common assessment and talk about what the data
>
> means to them. By that time, they should have done some teaching,and
>
> show consistency in their assessments. They will have to talk about their
>
> strategies that they used. My role is to keep the big picture moving. They
>
> will need to talk for a while. My job is to facilitate and determine what
>
> they have come up with. I need to get the statements from the teachers.

By striving to fulfill the role of facilitator and guide, gently 'herding' the

conversation from behind rather than leading by taking control of it, Bernard was

trying to exemplify what he was coming to believe was teacher leadership.

It was clear, as Bernard talked about his career path, that Reading

Recovery had been instrumental in defining the view he had of himself as a

professional. The program had allowed him to begin the quest of answering

questions about how to help children read, and had given him the opportunity to

influence other teachers through the role of teacher leader. The opportunities for

leadership then extended beyond the Reading Recovery group to involvement in

professional learning communities (PLCs) as a Literacy Advisor. His confidence

in providing leadership was reinforced by exposure to graduate level reading

courses. He believed that the graduate courses had provided him with the

knowledge to synthesize the professional literature and apply it to the real world

he was meeting in his and his colleagues' work. He felt his credibility with colleagues was variable, noting that those who had done graduate courses were more accepting of ideas he introduced. Those who had not participated in the more advanced education were more likely to be looking for definitive answers that were not offered in the qualitative research he introduced. He commented:

> I find that almost every time I work with teachers, the issue comes up, "What does the research say?" But it's not, "What does the research say so we can talk about it"; it's, "What does the research say is THE answer?" – like the truth is out there.

Although he was skeptical that the district administration would maintain a position that afforded him a great deal of autonomy to work in creative ways with teachers, he continued his unofficial efforts to aid teachers, just as a district Curriculum Supervisor or Curriculum Consultant would do. His efforts at initiating change in classroom instruction were generally approached in a restrained way (though he might not characterize them as such), with Bernard acting as a guide rather than the overriding authority on the subject. He preferred to introduce ideas and elicit conversation, so that the teacher's change was, for the most part, a personal creation of coming to know. Rather than engage in explicit suggestions for change to teachers' practice, Bernard nudged the teachers forward, scaffolding their thinking, lending background support – leading from behind.

The low-key approach did not mean that Bernard believed that changing teacher ideas was a simple task. He believed that some teachers (and he included

himself in this category before he became more reflective about his teaching practice) blamed the child for not being able to read. That is, the child "won't do it", rather than "can't do it". He suggested that it took two to three years for the Reading Recover trainees to truly change attitudes, citing the propensies for them to slip too quickly into "test mode" to see if children could perform adequately on their own, rather that providing sufficient repetition and scaffolding to ensure adequate assimilation of the strategies. He also knew that many classroom teachers had a limited notion about what the Reading Recovery teacher was teaching the children to do. He felt that there needed to be a greater connection between the classroom and the pull-out program for the children to benefit to a greater degree. He speculated, "I can see the Reading Recovery teacher going out into the classroom and helping more." When asked if he felt the program was making a change in the way reading was being approached in the regular classroom, he commented that he did not feel that much had changed:

> It's tough to make change because the program isn't classroom based,
> therefore hard to convince the teachers of its practices. I think the
> Reading Recovery teacher should be almost a classroom support teacher –
> at least allotting some of the time to work in the classroom.

*Changed Focus*

As the AISI cycle that funded much of Bernard's work in early literacy enhancement with the Kindergarten PLC and Reading Recovery was coming to an end, Bernard recognized an apparent change in the school district focus and

approach.  Subject specialist leaders were being replaced internally with more generic administration bound individuals (principals and principals-in-training). Bernard would have liked to remain in a leadership position, not simply a school PLC facilitator, but at the divisional level.  However, he realized that this was unlikely, since the focus was to be on "greatest area of need", which meant literacy might not be a priority.  Although the program was supposed to be driven by data collected on students' learning advancements, it soon devolved into an emphasis on teaching strategies.  Most strategies were sound practice, but were being applied in a blanket approach, not through analysis of students' actual needs.   Bernard commented in his usual low-key way:

> The people who are spearheading this effort, Learning Services, I don't think they understand learning very well.  When one of them came into our school to look at our school's performance, he suggested to the principal and vice-principal that I should be taking on some of the learning strategies in Reading Recovery.  So I'm supposed to take on a Venn diagram, or something like a comparison matrix.  I don't think they understand that we're teaching these kids how to read and we have some strategies of our own.  They don't understand Reading Recovery at all, they don't understand that we're also research based, we also use what we see – we make observations.  We react and our teaching changes based on what we're observing.  It's not like we're just doing whatever we want.

> He went on to explain that he felt that those in charge had good intentions about wanting to help students have better achievement in the exams, but that they

simply did not have the expertise in many of the content areas they were providing direction for. He worried about the consequences of displacing the in-house leadership in disciplines such as literacy:

> I think if they're not careful, they're going to lose the expertise, the people with the language arts expertise. I'm just worried that you can learn all about these strategies, and spend so much time on them without looking to see if the strategies are effective for teaching. For example, we have no one in our division who is considered a Language Arts specialist.

Although the school district abandoned most of his previous AISI work, Bernard's Reading Recovery program was continued in a limited way, thanks to other Board funding. Bernard was assigned to other tasks within a single school that included providing what could be called administrative support to teachers and their Special Needs students. When Bernard recognized that changes were in the wind that would likely lead him away from teacher-leadership possibilities, he calmly said, "That will be OK with me, too, I'll just close my doors." Perhaps it was his years of experience, or maybe his personality that seemingly allowed him to accept the inevitable shifting priorities. As a result of his changed role, and the assignment to a single school, Bernard found that he was rarely asked for assistance from other teachers, beyond a few inquiries about what to do about a struggling reader. He did, however, field inquiries from a new source:

> What's really interesting, I've got some response from the French Immersion teachers. They seem to be questioning a lot about what they are doing with French Immersion and their struggling readers. I don't

know if I can help them but I talk to them about reading theory and how a child learns to read and how that might impact on how that fits into French Immersion.

The classroom support role also allowed Bernard to become familiar with the process of how struggling readers were dealt with throughout the district. The primary source of information for documentation came from the evaluation and recommendations of the psychologists hired by the district to do the testing. Bernard commented that most of the recommendations for remediation offered in the reports were "across the map, way out there." He felt that most of the recommendations were psychologically based methods related to brain functioning, instead of being based on identified best reading practices. He suggested that this was a devaluing of the knowledge of teachers, "Some teachers have gone to the trouble of becoming better at teaching reading, but we still don't value that. I'm not being sought after that much and I have some expertise at teaching reading."

When questioned about why he felt teachers with reading expertise lacked public credibility, he felt some of the blame lay with the teachers. He explained that the psychologists entered into the assessment of reading difficulties with a strong belief in the failure of neurological functioning that could be empirically evaluated and attached to practices intended to rectify these dysfunctions. He believed that reading specialists, on the other hand, have damaged their own credibility by being less able to articulate theoretical foundations for their practice. He described it with this analogy:

Psychologists come in and they see the mind as a black box, and they're going to attribute lots of different attributes to this black box, and they put labels on kids. Because the child has a label, then this is the strategy that the child needs. Whereas a reading specialist knows what they are doing is not going to put labels on the kid. What they are going to do is assess the child for reading; we're going to be very concrete about this. We don't say, the child has a poor working memory, we simply work on the child's ability to remember words. (Psychologists) don't have the theory of reading.

Bernard began his quest for a deeper understanding of reading because of his perceived failures with some children in his classes. After many years of study and practice in reading remediation and leadership for fellow teachers, he found himself, for at least a portion of his time, back in a classroom, with a grade level he hadn't taught before. He recognized new challenges in working with the older children's abilities and the limited time available in the daily schedule for providing support for his learners. He was also unsure of his capacity in working with the older children, "I'm a reading specialist at the really early levels. I feel like I have a pretty good handle on that level, grade 1 especially, and probably up to grade 2. At grade 3 and 4, I'm learning to be a specialist in that area too, applying what I've known." But he recognized that applying his knowledge to the older readers required some shift in understandings and he identified a need for conversations relating to his evolving understanding of the older struggling reader. Unfortunately, given the new structure of his assignment, he did not see

an avenue for engaging in these conversations and was concerned that without an

opportunity to engage, he might lose his knowledge edge, " one of the ways the

reading specialist becomes a specialist is by talking to a lot of other people, and if

you go back into the classroom, you've got to maintain those conversations or

lose it."

When contemplating the possibilities of the ever-swinging pendulum

coming back to a focus on literacy, Bernard was not confident that he would once

again be called upon to provide a leadership role for other teachers.  He pointed

out that he was moving quickly towards retirement.  Given that many of teachers

with whom he had collaborated, were older, experienced teachers and few

younger teachers had expressed an interest in, or were prepared for, assuming a

leadership role, he wondered to whom district literacy leadership would be

passed.

Artie: Leading from the front

From our very first meeting, I felt a connection with Artie's energy,

enthusiasm and sincerity.  I knew our conversations would be lively, interesting,

and heavily weighted with shared beliefs.  As her story unfolded, I was not

disappointed, but over the time that elapsed during the data collection process, I

also heard and saw Artie dealing with bitter disappointment and feelings of

betrayal.

In comparison to the other two participants in this study, Artie's career

path resulted in a strong and more sustained role in leadership in reading

instruction, though it was only temporary.  She began her teaching career in her

late twenties.  Attaining an education degree was the result of encouragement

from coworkers in a previous occupation who recognized her potential as a

teacher.  Upon completion of her studies, she accepted a position with a rural

school district, in spite of being a diehard city girl.  She believes that it was her

enthusiasm for the job that impressed the superintendent who interviewed her.

Because her minor study was in Special Education, she was assigned to work with

struggling learners in grades four to six.  Right from the start she knew she was

not interested in students with behavioral or severe developmental difficulties, but

rather, those experiencing difficulties learning to read.  Most of her students were

boys who had been in Special Education classes all the way through school.  She

found it an interesting challenge to find new approaches to reading for these

veterans of the Special Education (SpEd) room:

> I worked really hard and really liked what I did.  Most of the kids I
>
> worked with were boys, and they really struggled.  I kinda steered my
>
> career to focus on just reading because this is what these kids needed.

### *Reading Specialist*

Artie stayed in this position for seven years, though in the fourth year, she

began taking courses to improve her teaching, and develop an understanding

about how reading abilities were attained.  It was also during this time that she

developed an important relationship with a mentor, the district Reading Specialist,

whom Artie admired and greatly respected.  Her mentor encouraged Artie to

enroll in graduate level reading courses at the university in a nearby city.

Initially, she was not interested in completing a Master of Education degree, so instead, opted for a graduate diploma. Completing the diagnostic and remediation reading courses opened the opportunity for Artie to join the regional professional council of reading specialists. Membership in the council was important to her because it allowed her to engage in professional conversations with people knowledgeable in the field of reading. It was important for Artie to show that she had the professional knowledge to be a reading leader.

At the same time she was completing the diploma, her school division was experiencing growth and change. The provincial government created a new district for the schools in the region in which she lived, and the new district was looking to develop district consultants for psychology, early childhood services (ECS) and reading. Curiously, both the psychologist and ECS positions were full time, while the reading specialist was half time. She remarked, "There was a lot of politics involved." Artie's mentor played a role in her career by recommending her for the half time position, which she gladly accepted. The other half of her job remained Special Education teacher in her old school. For the next four years, she conducted reading assessments for students referred to her and compiled reports with instructional recommendations, which she shared with the parents and teachers. When possible, she also liked to provide some instruction to the assessed child. Although she was keen to provide help for struggling readers, she found the assessment job solitary and somewhat frustrating, "I came up with recommendations, but I didn't know if any of them were carried out."

During the fourth year of this appointment, politics intervened to shape the nature of Artie's position. The school district experienced a serious upheaval in governance and management that, in the end, resulted in Artie and her colleagues losing their positions at the district office, forcing her to reconsider her future. Artie recounts the experience of being eliminated from her job:

I remember (the superintendent) coming to the office and I knew it was my time. It was like each one of us had our time to leave. It was towards the end of June and so I wanted to know what was going to happen. He gave me the option of where I wanted to go. So I had to go back into a school. I was really disappointed because I felt I was going backward – I'd worked so hard.

*As it happened, the district turmoil was taking place at about the same time as the provincial government was cutting funding to school districts throughout the province, and reading specialists, including Artie's mentor, were being dropped from district administrations. With a note of bitterness, Artie pointed out that while curriculum specialist positions were being cut, the psychologists were kept: "As if that was a more important position. And I thought, you're making a mistake here, you're keeping the wrong person."*

*A New Opportunity for Leadership*

It seemed to Artie that this was an opportune time to do some life adjustments, and so she decided to begin a family and start a Master of Education

degree program.  Her disappointment at being removed from the Reading

Specialist position led her to believe that "I needed a Master's because I thought

I'd be taken more seriously (as a reading teacher leader)."  Since she had already

taken the majority of reading courses for the graduate diploma, she was able to

focus on other language arts courses.  As with the diploma program, Artie did all

the course work **part-time**, requiring her to travel more than one and a half hours

to attend class, while she continued to work full time in a school.  Her studies also

shifted her focus from upper elementary to early childhood and emergent literacy

as she embraced the significance of phonemic awareness as an important indicator

of later reading success.  The shift to emergent literacy studies proved to be

fortuitous for Artie when, four years after being removed from the Reading

Specialist position, she was once again approached by the central office

administration to lead an early literacy program that would take advantage of

provincial Early Literacy Initiatives (ELI) funding.  Artie was to develop and

oversee the implementation of the program for one-fifth of her job (one day per

week), while continuing as Special Education teacher in her school to make up

her full time position.  As with the earlier specialist position, Artie attributes her

selection in this to a mentor within the school district central office.  In describing

how she ended up with the ELI position, she commented, "I'm enthusiastic.  I

think you can tell when I'm passionate about something I really jump right in

there.  So she saw that and she created an opportunity for me by going back to

division office and talking to administration."

Over the three years of the ELI project, Artie used her one day per week to provide workshops for teachers and parents on themes and practices related to early literacy acquisition. She brought together teachers from across the district to decide how the project should proceed. As a result of her study in university courses of the significance of phonemic awareness as an indicator of future reading success, she convinced the teacher groups to adopt one of the standardized tests for phonemic awareness. Whereas the Reading Specialist position was somewhat solitary for Artie, the new ELI position gave her the opportunity to develop true teacher-leadership skills. As overseer for the project, she trained teachers and others to administer the assessment tools. She also exerted her leadership through her insistence that there be a qualified teacher in each school to ensure the program was implemented well. On this point, she was only partially successful as only two schools took this advice, while others chose to use teaching assistants to do the job. She lamented,

> The kids that need the teacher the most are working with the least
> educated and qualified people. Switch it around – send the TA in the
> classroom, set them up with work, and let the teachers come out and work
> with the students. I could never figure that out. And those kids – we
> wonder why they're not getting any better.

### *Creative Opportunities*

Within three years of the ELI funding implementation, the provincial government once again stepped in with funding for school districts to undertake

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initiates to improve student performance on provincial achievement tests (PATs).

The Alberta Initiative for School Improvement (AISI) program, required school

jurisdictions to submit proposals for the use of the funds, but in its first

incarnation, placed few limits on projects. Once again, school division

administrators approached Artie to see if she would be interested in developing a

proposal for this new source of funding. She was told that the board wanted to

focus their efforts on early literacy, meaning the pre-school aged children, in the

hope that by better preparing children for literacy prior to them entering

kindergarten, they would have better success with learning to read in school. The

idea excited Artie, and she was quick to accept the challenge, leaving her position

in the middle of the year in order to write the proposal and prepare for a

September start. Artie's voice teemed with excitement and pride as she

reminisced:

> The first (AISI) cycle was really open to being creative. We wanted to do
>
> something that would make a difference but that you would never have
>
> had the money to do before. Nor would you have ever gone outside of
>
> your building. We never had enough money for inside the building, let
>
> alone outside. So we were focused on the five (years) and under
>
> population. I started doing a lot of research. It was just a fantastic three
>
> years.

Artie implemented a family literacy program that included an information

campaign and series of workshops to acquaint parents with the importance of

engaging in developmental literacy activities with their children. In conjunction

with interagency groups such as the Health Authority and Family and Children's Services she developed a series of ten cards with information and activity ideas covering topics including literacy, language development, physical development and play. The cards were distributed to parents through doctors' offices, public health facilities and social agencies that came into contact with parents of young children. She delivered a series of "Fun Festivals" in most of the communities in her area, where children and parents were invited to join in on entertaining activities that promoted literacy development, and all children left with a bag containing a book for their parents to read to them.

In two private daycares in the region, she trained the staff in emergent literacy activities and completely outfitted the facilities with libraries and fixtures to create an appropriate reading atmosphere. Using both new and gently used donated books, she placed a selection of children's storybooks in doctors' offices and in waiting rooms at the local hospitals. For four years, one year beyond the initial funding, she also produced a weekly story reading that was broadcast Sunday nights throughout the school year by a local radio station. For the libraries in the region, she created boxes containing all the parent information created in the program, as well as books, tapes, activities and a video on reading to children for parents to borrow.

In order to know if the initiatives were indeed making any difference, Artie and the ECS colleagues she led decided they needed an assessment tool, and so developed a 'readiness awareness measure', based on work that a school jurisdiction in another province had shared with them. As with the earlier work

with the phonemic awareness assessments, administrators pressured Artie to hire teaching assistants rather than teachers to administer the instrument, but she adamantly pushed for teachers who had the background knowledge to better administer and evaluate the results.  All the children entering into school were assessed with the tool.  The project was highly successful in the district because the ECS teachers had participated in development of the assessment and recognized the value of the information provided.  The challenge, when the initial funding for assessment administrators was exhausted, was for the classroom teachers to find the time to give each child the baseline assessment at the beginning of the child's school career.

*New Chances to Grow and Lead*

In the third year of the AISI cycle, using some funds left over from the less successful aspects of the projects, Artie began training for implementation of a language arts instructional program, aimed at children in kindergarten to grade 3, purchased from another school district in the province.  The fact that she had completed graduate work in reading and language arts allowed her to participate in the training, which in turn, would allow her to train other teachers in her district.  Artie was interested in the program because she saw it as a natural extension of the learning children had been undertaking in the ECS program.

Most of the initiatives in the first AISI cycle took place outside the schools' structure, and it was therefore difficult, in the short term, to evaluate how successful they were in helping children be more prepared for school.  At the end of the cycle, the district retained only a few of the initiatives, for example, the

assessment of phonemic awareness.  However, the rules for renewed AISI funds in a new cycle required the school jurisdictions to propose new projects.  The division administration wanted to continue with the literacy focus.  "And," emphasized Artie, " we wanted it to impact all teachers, all students; we wanted it to be K to 12; we wanted it to be one project; we wanted it to be sustainable."  So Artie and the district AISI Coordinator conducted a series of consultations with teachers throughout the district, and across grades to determine what the literacy problems were and what needed to be done.  From the sessions came the Constructing and Expressing Meaning project (CEM).

During the summer vacation time Artie worked to put together a comprehensive program that would provide Division 2, 3 and 4 teachers with strategies and activities to use with their students to help them become more proficient readers.  One of the primary focuses of the Cycle 2 proposal was teacher professional development, particularly in the area of content reading.  To facilitate a strong launch of the program, Artie developed and delivered a two-day retreat for the CEM coordinators from each school, introducing them to the program and resources they could use to support the other teachers in their schools.  Once the term started, Artie was responsible for supporting the CEM coordinators, conducting workshops to introduce and to model techniques, and acting as general consultative support for all the teachers.  She also invited some well-known experts in the field of content area reading and remedial reading for older struggling readers to present professional development workshops in the district.

Artie explained that the main element of Constructing and Expressing Meaning was the professional development of all teachers in order that they see themselves as teachers of literacy, who could help students become more aware of reading processes and strategies that help readers gain more from what they are reading. CEM also provided funds for schools to improve their library holdings of informational books, student resources and teacher resources. In order to ensure the library book funds were used appropriately, Artie approved all purchases.

Just as she had done with the first cycle's projects, Artie spoke proudly of the accomplishments of the CEM program. It was a large and cumbersome project to initiate, and there was a certain amount of resistance from teachers in Division 3 and 4, who worried that they might be taking time away from students learning the necessary subject-area content. Artie's job was to help the coordinators in the schools to convince and support the teachers so they could witness the efficacy of the approach in the results of their students. From data attained through written reflections collected twice a year from students and teachers, Artie knew that many teachers had embraced the spirit of the project, and that more were being won over as they became aware of the positive results:

We see what they are telling us – the culture is changing, the language is changing. We'll walk into the staff room and the teachers will be talking about strategies. So they see the culture changing. They see the students talking in a different way – they'll be using the language, "I'm making a connection" or "I'm self-questioning". So they're using the strategy names

there. Well, they're telling us it's making a difference, impacting their thinking and learning.

Artie's enthusiasm for the positive results was not simply hearsay or her own gut reaction, but a reflection of the comments she received from students and teachers on the surveys she conducted each year of the project. She was able to create pages of quoted comments for her annual reports that reflected the changes taking place in teaching styles, results teachers were noticing in the performance of their students, and changes in student attitudes towards reading. All this she enthusiastically shared with anyone in the district whose attention she could grab. When commenting on the surveys, Artie's excitement was infectious:

This is what our teachers are saying about CEM. This is what our students are saying about CEM. I'll put it on our website. All of this will be compiled together and we'll share it with everybody. Students are gradually changing their reading behaviors. Teachers hope the students will continue to strategize. It's so positive. You can't have a better focus than literacy.

At the same time as Artie was implementing the Constructing and Expressing Meaning project, she was continuing to provide training for the Division One teachers for the instructional program she had initiated at the end of Cycle One. This, too, was gaining credibility for its effectiveness in helping the younger children learn to read and, in fact, as the teachers in Division 2 saw the results, they were keen to be offered the same opportunity to learn the strategies. Although not part of her job mandate, Artie was loath to turn away teachers

interested in improving their teaching skills, so she developed a reputation for stepping in when asked. She elaborated:

> If they ask me to come into a classroom, and they aren't even connected to any of my groups, I'll go in, and they know that. I rarely refuse anyone, even though that's not really connected to anything. I really created my own job. I've just opened it up to more and more. As long as it's literacy, I feel that it's my job – any way that I can go and support teachers.

It is interesting to consider that, by the final year of the second AISI Cycle, Artie had expanded her expertise in reading instruction by providing support for programming from the very early stages of emergent literacy through the primary grades, and right through to the content areas of the high school curriculum. Not many school districts could boast a professional resource person of that caliber. However, in spite of the fact that she had spent the best part of eight years providing consultation services to the district, six years of which were full-time, she was still only a coordinator, with 75% of her salary coming from the projects. Furthermore, she understood that funding for her position was based on the temporary AISI projects. The programs she had implemented had been successful by most measurement standards, but it was questionable whether the school division would choose to use its base funds to keep any of them going once the AISI funds were gone.

*Disappointment*

When the provincial government renewed the AISI funding for yet another cycle, Artie knew that, despite the quality of the program, and despite the research

that identified the fact that real change took from three to five years to truly occur, the AISI team would have to come up with a different program in order to be granted new funds. Frustration saturated her voice as she spoke of the directive to create yet another program for the third cycle of AISI:

I can't think of a better project than this! Why would you stop a project at the end of three years? It's so ridiculous! Doesn't anybody know something up there that makes these decisions, how change happens. I mean, look after two years – in the comments I just read. "Are you satisfied?" A hundred percent said, "Yes". "I want to do more with the facilitator … it's great … it keeps us well informed … always available."

In spite of her conviction that the program was extremely successful and should remain the professional development focus, she began planning for the new cycle by holding focus meetings where teachers decided on what they thought should be the path for the new funding. When the time came to establish the priorities, it was clear to Artie from the direction administrators in central office had decided upon, that the wishes of the teachers were to be overridden. Politics once again overtook her career journey. Several of the principals wanted to support the continuation of Constructing and Expressing Meaning, but they had no discretionary funds and the central office administration had decided that technology and math would be the new focus of their AISI efforts. Artie found herself being slowly pushed out of the administrative circles she had formerly inhabited. When the school division hired a new Assistant Superintendent for Student Services, Artie found she was to become part of a team that would be

responsible for special needs services throughout the division.  She felt her position as reading consultant had been diminished, and once again she was being cast aside, no longer needed.

Once again Artie was devastated, feeling that the service she had dedicated to the school district had been disregarded.  Not only that, she felt betrayed.  Prior to the shift in AISI focus and the shuffle that removed her from the status she had enjoyed during the first two AISI cycles, she had been told that as the district reclassified their Directors to Assistant Superintendents, she too would be given a promotion and would be given the title of Reading Consultant.  This did not happen.  Furthermore, the colleague with whom she had work closely over the previous six years, and who had received one of the promotions, made no attempt to protest her treatment.  She summed up her career with the district this way:

> You know, it always seems that I take two steps ahead and I have to take a step back.  Because the same thing happened before, I was the Reading Specialist, and the whole thing came crashing down.  And I went back to the classroom.  But I didn't have my Masters then.  I worked on and got it.  And the opportunity came again and I was seconded and they pulled me in again, and I was there for six years.

*Leadership and Relations with Colleagues*

As Artie's story unfolded in her conversations, it became very evident that teacher leadership was a strong personal motivator.  Artie's career path had always been governed by her desire to help children become better readers, but

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over the years this concern transformed her own work into that of helping other teachers learn as much about reading as she had been able.  Her excitement and enthusiasm for the work meant that she was always ready to provide leadership by conducting workshops, and advise about reading instruction for colleagues.  Although she was responsive to any requests for assistance, she did not leave it to chance, promoting her ideas whenever possible.  It was not always an easy road, however, especially when her appointment was half time district reading specialist and half time in her special education position.  Colleagues ceased to see her as 'one of them':

> So I was like half a person, which is never a good thing.  All of a sudden
> they view you differently.  I mean, you're that division person right away.
> Sometimes I have so much to share and I was so excited.  And some people
> don't take too kindly to that; they don't want your help.

So when a new school opened, and she was reassigned to it, Artie's credibility was questioned less. However, in her early days as a reading specialist, she found the work solitary, and in some ways lacking in satisfaction, as she was not certain her suggestions for remediation were being followed.  What motivated her more was the chance to provide workshops and in-service training on reading strategies. For many teachers, becoming a teacher leader is achieved through further education in educational policy, and is oriented to school leadership; that is, training for administration through a Master of Education degree.  Artie never saw that kind of leadership as her area of interest.  In fact, at one point in her career, when the position of Director of Special Education became available in

her district, she did not apply. She explained, "To me it was just a paper job. I wanted to be connected to students and make some kind of difference in their journey to becoming readers." Having already taken the majority of the graduate level reading courses for her diploma program, she combined her focus on reading and language theory with that of the critical consideration of teaching philosophy for the Master's degree she obtained.

When she lost the reading specialist position, she responded to it as though it was a personal defeat, surmising that if she had a Master's degree, "I thought I'd be taken more seriously." In fact, following her studies, her real teacher leadership role evolved when she was first appointed to the ELI position and later with the AISI positions. These special projects afforded Artie the opportunity to draw colleagues into the planning and development of projects, while allowing her to conduct many workshops and learning opportunities for her teacher colleagues. At several points in her career, she felt her enthusiasm and knowledge had been acknowledged and promoted by significant mentors and had led to what amounted to invitations to take on the special tasks for ELI and AISI.

Over the years, Artie worked with many different groups in the district and felt that she had a significant level of credibility with her teaching colleagues. She explained her perception this way:

> I know that they respect me for what I know. That respect may come from them knowing that I walk the talk. I'm in their classrooms. I'm doing demos, and I'm still seen as a teacher, too. I'm in there showing them how to do it. I get lots of thank-yous and recognition about the work that I'm

doing with them and helping them move things along in their classrooms.

It's not that I'm just spewing information, and sending them to websites.

I'm right in there messing around with them.

The last few years had also raised her credibility among fellow teachers.

She related the following experience:

I have unbelievable support from the people that I work with. I just got a

dozen roses (from a teacher) thanking me for mentoring for the last eight

years and moving her along in balanced literacy and ELI. I know I have

tons of positive response from everybody.

Throughout the discussion of her career, Artie identified the importance of

support from people who believed in her. From the first superintendent who hired

her, through many later administrators who supported her initiatives, she

identified individuals who encouraged her to aspire to work beyond her

classroom. In particular, she mentioned two senior consultants who recognized

her leadership potential and not only encouraged her, but also helped to promote

her leadership abilities with the administrators who were looking for capable

people for projects. She explained about one of her mentors, "I think she saw

something in me, just like I can spot people." Her experience showed her the

importance of recognizing leadership potential in others, and helping foster this

potential:

I always think that when you elevate somebody, you elevate yourself. I

never had problems with making someone else look good, because at the

same time, you are part of that too. A lot of people that took on these so-

called roles were not in leadership roles. They were classroom teachers in different subject areas. That's one thing I never hold back – when I see someone doing something fantastic in their classroom, I tell them what a great teacher they are. I've had so many people just say, "I don't know if I've ever heard that from anybody." How sad is that when it's a veteran teacher and I'm one of the first people telling her that.

Artie believed that her leadership style, particularly her ability to promote others had evolved through her own experiences. In the early days of her plunge into leadership in reading instruction, she was "trying to do my own thing" and not always aware of the potential of others. Through her own experiences with leadership, she felt, "Now I'm seeing because I've had the opportunity, the role, and I can make something happen for somebody. That's the difference I can make."

She felt the Early Literacy Initiative and balanced literacy group members were highly regarded in their schools, and felt it an important part of her job to "blow my colleagues' horn and make sure people know what good work they have been doing." The Constructing and Expressing Meaning coordinators working with content area reading at the Division 3 and 4 levels were beginning to develop credibility in their schools, "The teachers who have taken this on have become leaders in their own schools, and it's fantastic. That was the whole idea – expanding leadership capacity." Artie ensured that school district administrators and board members were kept informed about the positive results being

experienced by the older readers. This included year-end awards of recognition for the coordinators.

While I listened to Artie talk about her successes with reading and literacy programming and her admiration and promotion of her colleagues in the schools and classrooms in her division, I saw that she left little to serendipitous opportunity. Rather, she seemed keen to begin the process and keep it expanding throughout and across all the levels of instruction in the district. She led from "*in front of the crowd*" encouraging the rest to join in and experience the joys of successful student learning.

In spite of the success, Artie was also honest about the less positive outcomes. She acknowledged that some teachers could be resistant and even insulted if it was suggested that they needed to learn more. Some teachers felt overwhelmed by the number of initiatives they were expected to participate in, not realizing how, for example, CEM intertwined with the Professional Learning Community functions. She commented that they did not understand that "CEM is what we are doing and the PLCs are the venue." Fortunately, some teachers became less reluctant when they saw the potential results for both themselves and their students: "Some of the teachers I worked with said that this year was a highlight of their career. I worked with them at their level and brought them along. Sometimes they just needed support to see how things were done." For those who did not seem willing to participate in the initiatives Artie was promoting, she developed a philosophic stance:

I've accepted that we're all on different journeys. You're going to meet so many different colleagues, on different points of their journey in their careers. So, being a leader is being patient, and really recognize that people are at different places on the learning curve - their background knowledge, and their practical knowledge, and their teaching knowledge. And they have their own experiences, good and bad, in dealing with colleagues, and it's made them who they are in their classrooms today.

She also acknowledged her own continued efforts to make sure her leadership position was warranted. She felt confident that her knowledge about beginning literacy was secure enough to answer any challenges, but recognized that she needed to strengthen her knowledge in content reading. It was important to her to continue to read, go to conferences and meet with the experts in the field to stay current. A solid understanding of the principles behind the program she promoted was important so that when challenged by those resistant of change, she was able to "respond in a way that is really positive and not make them feel that they are wrong if they don't know."

Unfortunately, it was this strong focus on relationships with the teachers to which she attributed her eventual diminished significance in the district. Even though she had not had a regular classroom assignment for eight years, she still considered herself more a teacher than an administrator. She commented. "I always saw myself as more of a teacher; and I think the teachers saw me as that too, because I was always in the classroom." She surmised that if she had "played along" with the administration, she would have been better off:

"They (administration) never saw me as an administrator. The whole thing about AISI, with the project coordinator, when the whole thing ended, if I had been on their side, instead of the teachers' … I was just not visible, and when you're not visible, you get crushed."

As the instructional focus in her school district shifted, and the potential for Artie to continue in the literacy and reading leadership role she had fostered with such energy and enthusiasm faded, she began to feel defeated and ill-treated. The achievements tests showed that the children in the district were not being as successful in writing as they should be and she knew from the focus groups she had organized that the teachers, particularly in the elementary grades, were wanting to move in the direction of increasing their skills in the field of writing. The disregard for the teachers' concerns was the ultimate disappointment for Artie. She was beginning to consider the options she might pursue outside the school division where she had worked for more than 20 years. It appeared that the school district was about to lose a valuable resource.

Reading is a complex act comprised of many interlinked components that children must learn to control. The stories of the teaching lives of Sadie, Bernard and Artie were also complex and multilayered, but I now have pictures of the busy lives of these professionals, eager to help their colleagues better meet the needs of the children. Different though the stories may be, there are also common ideas that wind through. In the next chapter, I would like to look more closely at where the stories intersect.

CHAPTER FIVE

COLLECTING THREADS - STORIES INTERWEAVE

Although each of the participants had very different stories and approaches to teaching and instructional leadership, I detected common threads that ran through the three stories. In this chapter, I will gather together the threads into what I saw as common bindings.

Careful reading and rereading of interview transcripts reveal four overarching categories, which I will explore. They are:

1. Shaping beliefs concerning the teaching of reading

2. Creating unique experiences for teaching reading

3. Leadership Experiences

4. Ultimate disappointment

Within each category are several elements that more specifically characterize achievements, hopes, aspirations, and in at least two of the three situations, bitter disappointments.

Shaping Beliefs

Research into teacher beliefs is inconclusive in establishing whether or not teachers' practices reflect their espoused beliefs (Lenski, Wham & Griffey, 1997; Power, Zippay & Butler, 2006). In the stories of Sadie, Bernard and Artie, each person's beliefs about the capacity of all children to learn to read if the 'right' method to teach them could be found, was the catalyst for the pursuit of a greater

understanding of reading, and ultimately the drive each had to share this learning with other teachers. That does not mean that the belief structures were static, but rather they were predictably dynamic as each of the teachers in this study grew to know more and more about the act of reading and about reading instruction.

*Personal and Professional Influences*

Sadie, Bernard and Artie all spoke of colleagues who had specific influences on their development as reading teachers. For Sadie, it was an older colleague who modelled a belief that children should have plenty of books to read. In remembering her early career, Sadie related how that colleague would purchase books from whatever sources she could find in order to stock the shelves in her own and other teachers' classrooms. Even after 40 years, Sadie's admiration was obvious:

> She filled her classroom with little books, skinny little stories that she
> bought herself from sales – auctions sales and garage sales. She came in
> with boxes and boxes of them. She carried with her this huge love of
> books and reading into the school. She supplied the stuff for kids to read,
> not only in her own classroom, but a box of books would arrive in your
> classroom. So to have somebody like that who not only brought this huge
> powerful love of literature and books into our school, but actually
> distributed the stuff and brought it into the reach of every child.

Sadie carried the effect of this early influence throughout her career. The remnants can still be seen in the school from which Sadie retired. The Reading

Cottage (Sadie's whole school reading project) yearly murals of storybook scenes and characters covered with small strips of paper with the names of the children along with the titles of the books they read are mounted on the walls of the new addition to the school.

Where Sadie's personal influence directly impacted her interactions with the children, the influences Artie spoke of were more focused on her personal development as an instructional leader. From her earliest decisions to become a teacher and at different times in the story of her career, Artie was influenced by her own mentors who she believed saw potential in her to do more and either encouraged her to take on new challenges, or opened the doors to opportunities for literacy leadership in her school division. Just as those with whom she had worked promoted her expanded horizons, she also believed in encouraging the potential of her colleagues. She earnestly commented:

> There are key people in my life that just saw something in me, just like I can spot - in the role I'm in now - I can spot people. And when you find them, you really want to create opportunities for them.

Her philosophy of leadership included the encouragement of leadership potential in others, "I always think that when you elevate somebody, you elevate yourself. I've never had problems making someone else look good, because at the same time, you are part of that, too."

Unlike Sadie and Artie, Bernard did not identify his reading leadership with any particular individual. The most significant influences Bernard noted, particularly earlier in his teaching career, were much more personal. The usual

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teacher-reflection on students experiencing reading difficulty was extended by a

personal imperative – concern for his own child, who was experiencing those

reading difficulties. He was eager to learn about and practice different programs

and techniques to see if they would address the reading dilemmas. As he became

more engaged with the Reading Recovery training, Bernard's understanding and

beliefs about reading were influenced by the perspectives of Marie Clay, creator

of Reading Recovery, and the theorists whose work she identified as instrumental

in support of the practices of Reading Recovery. What seemed to resonate most

clearly for Bernard were the theoretical discussions concerning the complexity of

the task of reading. He explained his understanding of the way readers approach

the reading task this way:

> It's very complex; everything is changing all the time. You've got your
>
> little subsystem for attending to print, and that might change depending on
>
> where you're seeing the print. Which makes a lot of sense because the brain
>
> is an incredibly complex organism, and it make sense that we are
>
> developing those neural networks that work in conjunction with each other
>
> and are changing all the time depending on the task.

When Bernard decided to extend his studies into a Master's degree program, he

tended to filter his learning through the lens of his earlier Reading Recovery

studies. He did, however, embrace his newly acquired ideas of postmodernism,

and moved away from the positivistic perspective of research, commenting that

the former allowed for more considerations of "possibilities."

The personal and professional influences provided the footings upon which Sadie, Artie and Bernard could construct their understandings, beliefs and passions about improving reading instruction.

*Evolving Passion*

Of the three participants, Sadie was the one who identified most strongly with a passion for learning. She thought of herself as a creative person who was constantly changing her program, " I was the kind of teacher who could never teach the same program for three years. I'd have to change it and I mean change it dramatically." She attributed this not only to her creativity, but also to her analytical nature. In completing her undergraduate degree, she had been introduced to professional journals on reading, which provided research perspectives for the processes she observed occurring in her own classroom. The analytical stance meant that she was continually building her instructional program based on the unfolding daily needs of her students. Repeatedly she acknowledged the principal of the school, in which she spent the last 20 years of her career, for allowing her to follow her ideas and intuition, without interference or challenge.

Sadie's attraction to the analysis of problems was instrumental in her decision to seek further education, beyond the basic Bachelor of Education degree. Recognized by colleagues as an innovator in her own classroom, she described how she was often asked by others in her school to diagnose problems children were experiencing in learning to read, "and that's what I wanted to do."

Graduate courses in a reading clinic situation provided her with new tools to use in her work.

Sadie flourished at university, "I love university. I come alive at university. I just walk onto the campus and something inside of me just starts to smile." Making her experience even more rewarding was the fact that she found the kind of teaching she had intuitively been doing was reflected in the research literature, "I recognized it as what I had developed – what had grown out of common sense and applications of what was needed." The remedial work with clients in the reading clinic reinforced and extended the beliefs that she had developed through her classroom experiences. She shares:

> I just have this great belief and faith that if we want children to write, we
> need to write with children; if we want children to read, we need to read
> with children. And they never let me down but it takes time. And an
> inordinate amount of patience. And the trust that something is happening
> here, even if it's not showing today, something is happening.

The study of diagnostic teaching and remediation Sadie experienced in her Master's degree program addressed a few of her questions, but she lamented that "doing the specialist work in the clinic doesn't teach you how to teach reading." She went on to explain,

> With the diagnosis, it still wasn't enough because you still needed to have
> a lot more knowledge and understanding of why these things were
> occurring. Why children were having difficulties with reading. So I still

didn't think I had a handle on what I was doing, still building and still

growing – still analyzing.

Her continued quest for more understanding resulted in yet further formal

graduate study.

Sadie's desire for understanding about how to help children read, her ever

expanding understanding of the processes involved, and the validation about the

kind of thinking and actions she was following with her students were the fuel

that drove her passion for teaching struggling readers.  It led her to a belief that

the one-on-one instruction delivered by her or one of her carefully trained

paraprofessionals was the most powerful learning experience for children, a belief

that reconfirmed her dedication to public school education.  She commented that

she had a "fleeting thought" that she might take her expertise into private work,

but realized that in private practice "the children who needed me the most

wouldn't get me – they wouldn't be able to afford me."  She also attributed her

43-year dedication to public education to the fact that the school she taught in

valued her creativity and allowed her to provide children with the instruction she

felt would be best for them.

Artie's original teaching background was in special education and her

experience was with pullout programs aimed at assisting the older elementary

students whose reading ability lagged behind their classmates.  She recognized,

after several years of teaching, that she needed to expand her approaches to

learning.  Encouragement from mentors and other influences, as discussed in the

previous chapter, guided her to professional development workshops, and eventually into senior level university courses and graduate studies in reading.

Artie's shift in focus to early literacy learners placed her in the forefront when the school district administration was looking for leadership for the Early Literacy Initiative (ELI) work. Artie believed that her enthusiasm and passion for early literacy interventions, such as phonemic awareness testing and instruction, were what made her noticeable and a likely candidate for the job. The Early Literacy Initiative experience was the beginning of what was nearly a decade of ever expanding leadership opportunities for Artie. After three years of ELI, the Alberta Initiative for School Improvement (AISI) was implemented and again Artie was asked to assume a significant role. She attributed her promotion to the AISI position to her passion for expanding her own understanding, and for her enthusiasm in working with teachers to help them become better at reading instruction. From the initial early literacy involvement, Artie eventually expanded her leadership role to the full limits of Kindergarten to Grade 12.

Like Sadie and Artie, Bernard's beliefs about reading and his passion for Reading Recovery evolved from his experiences with the young readers in his classrooms for whom learning did not come easily. As well, it came from a much more personal place, that of a parent of a struggling learner. He describes his own parental anxiety:

> I definitely experienced the frustration from the position of parents who have expectations for their children to do fairly well in school. And I saw those expectations come undone because they couldn't handle basic

literacy, so I started to do a lot of thinking from that point of view. I also had the very visceral and emotional experience of being frustrated with the school system that didn't seem to be very concerned about his learning, "It will come in time." But I never saw any change happening.

Over the course of his career, Bernard engaged in the practice of various strategies reported to achieve significant results in reading acquisition. Although all had merit, in the final analysis, he generally found them less successful than his expectations.

In adopting Reading Recovery methods and extending his understanding through Reading Recovery Lead Teacher training, his understanding evolved into a more philosophical stance, which in turn, fuelled a desire to delve more into the theoretical perspectives of reading. He explained, "After I took the Reading Recovery training, I still wasn't satisfied and I went on to university to get my Master's, taking more reading courses."

*The Role of Reading Specialist*

From their stories, it seems clear that none of the study participants began their teaching careers with the aspiration that one day they would fulfil the role of reading teacher leader. For each of the participants, the journey to instructional leadership in reading was shaped and mediated by their overwhelming desire to help children learn to read, and their continual quest for the knowledge they believed would give them the tools to unlock the reading mystery for their struggling readers. It seemed for all of the participants, the more they studied

about reading, the more they were driven to learn , and to share this learning with others.

Although all three of the participants in the study attained Master of Education degrees, focusing on reading instruction, for none of them was it a direct decision.  Driven by their passion for understanding in order to better help struggling learners, Sadie and Artie first received a post-degree diploma in reading several years before deciding that the Master's degree was of interest. Bernard's intense advanced studies for Reading Recovery fostered his desire for more study.  In discussing their graduate experiences, all three commented that their motivations for study were somewhat different than most of their colleagues, who resided or were working in urban areas.  In the city school districts, it was possible for graduates to be engaged as designated Reading Specialists, primarily responsible for assessing students referred by classroom teachers. In most cases, this assessment was undertaken in the hopes of attaining special needs funding for the individual.  For the three study participants, no such positions existed in their districts.  This reality meant that their motivations and ultimately what they gained from their studies reflected a more internalised set of priorities.

This was particularly true for the diagnostic courses.  Although respectful of the tests and assessment tools, all three participants mentioned that their approach to using the information was more holistic than they thought would be espoused by their university professors.  In recounting the stories of their careers, each of the three talked about times when they were called upon to provide assessment services for the purposes of Special Needs funding acquisition, as

their counterparts in the urban districts did, but each also commented on how doing this sort of work didn't hold much appeal for them. Instead, each talked about how they had been able to integrate the knowledge attained through formal assessments and observations to inform their own practice with children. As well, this knowledge provided a foundation for recommendations they would make to other teachers who sought their help. Sadie, who had also taken training in psychometric assessment, spoke about what her graduate studies meant to her practice:

> I got a general sense; I got a resource in my mind of which tests I could use. I could sample a little of this and a little of that in order to diagnose a child's difficulty without having to do as we did in (formal testing). I got the ability to make an assessment, I got the ability to diagnose in Adidas, you know, running through the classroom, and you got it, you can hear it and you know straight away, and you can intervene or give a heads up to a parent or a teacher and keep moving.

Bernard's perspective was similar to Sadie's, though expressed less succinctly. His primary objection was with the "positivistic", and complicated assessment tools. He commented:

> To get the same level of information, I didn't think you had to go through that much trouble. I'm not saying that it's not helpful information, it's just not the complete answer. I find that I can learn a lot about children simply by opening up a book about what they like to read about and have a conversation about what reading is about. I know, for example in the

comprehension questions, they ask some literal and some inferential.  Are

we looking for exactness or are we looking for ballpark?  I'm not into that

kind of exactness, I don't think it's necessary.

Like Sadie, Bernard favoured the use of a variety of measures, some learned in

the graduate courses, some acquired through Reading Recovery training.  He

acknowledged the fact that the school district required specific assessment scores

to access funding to aid individual students, but was sceptical of the value of

labels that accompanied such coding, going so far as cautioning parents about the

consequences of such labelling, and instead offering alternative solutions.

When Artie first took the part-time Reading Specialist position, she

embraced the opportunity to provide the assessment support throughout her

district.  Having been mentored by a Reading Specialist from another district, she

expected that assessment would be the core of the position.  She did not think to

question the efficacy of that role in helping children to become readers.  However,

as her experience deepened, she recognized that the defined role was limiting

what she felt she could do to help.

At the time of her assignment to the Reading Specialist role, Artie had

completed a post-degree diploma, but did not hold a Master's degree.  By the time

she was once again offered a leadership role, the graduate degree was completed

and Artie conceived of alternative roles she could fill to aid students.  This time it

was no longer a solitary endeavour – but rather a very public role that encouraged

Artie's creativity, as well as recognized her expertise in a public manner.

What made these three teachers different from many of their colleagues was their drive to learn more about reading as both a personal gesture, and in the case of Artie, a public one as well. Because of where they lived, attending university courses required a commitment; either to a lengthy commute for evening and summer classes or to year long breaks from the regular teaching and relocation. Each of the teachers felt the personal satisfaction derived from the study was worth the inconvenience. As mentioned earlier in this chapter, Sadie relished the opportunity to attend university. Artie also enjoyed her studies, particularly during the summer sessions, where her attentions were not divided with school obligations. Bernard's interest in graduate studies was spawned by his initial introduction to theoretical foundations of Reading Recovery, and the research work of Marie Clay. Only Artie saw the post-degree education as a way to advance her career, by giving her a credential she felt would help her get the kind of positions she wanted to have.

Creating Unique Experiences for Teaching Reading

Another story that illustrated a commonality among the lives of the three teachers in this study involved their creation of unique working environments. Although the opportunity to define the working environment may have been enticing and gratifying, the sense of accomplishment it created may have ultimately resulted in the depth of disappointment all felt when the tides shifted and Sadie, Artie and Bernard no longer felt valued or needed.

Sadie's talents for independent, creative work and leadership had been recognized early in her career when she had been on a fast track to school administration. They were further fostered during the period of kindergarten program development and again in the school where she spent almost half of her teaching career. Repeatedly, in telling the story of her teaching life, Sadie credited the school principal for allowing her to follow 'gut feelings' and beliefs in her attempts to help children be successful readers and writers. Undoubtedly, Sadie's thoughtful analysis of the problems she tackled, and the successes she achieved were factors that contributed to the principal's belief in her. The relationship between Sadie and the principal ultimately shaped much of the reading and language arts instruction in the school. So important was the need to maintain her autonomy that Sadie was unwilling to cater to new colleagues who had different visions of how remediation should be conducted. Instead, she opted to retire.

Bernard was also instrumental in shaping his own career path. While Sadie was driven by creativity and, to some extent, restlessness, Bernard's motivation derived from knowing that, despite his best efforts, some students were still not succeeding at becoming readers. He was driven more directly by the desire to do a better job for his students. As well as taking advantage of professional development opportunities offered to teachers in his school district, Bernard went further, seeking other opportunities to expand his repertoire in order to serve the need of learners. When he discovered Reading Recovery, he initiated his own training with the hope that the school and district administration would be

sufficiently interested to create space for him to practice the technique with needy learners. Fortunately, Bernard's initiative coincided with a significant provincial ministry interest in early childhood literacy, which resulted in funding that allowed Bernard to implement the practice for at least part of his teaching assignment.

Bernard's years of experience with early and developing literacy with Grade 1 and Grade 2 students, along with his own initiative in seeking greater understanding about what might prove helpful for learners, led to opportunities for teacher leadership in district-wide Reading Recovery initiatives, as well as other AISI projects. However, as it began to be obvious that priorities within the district were changing, Bernard resigned himself to the belief that his time of leadership was coming to an end, and that even his cherished Reading Recovery program was in jeopardy. He stoically acknowledged that his advanced knowledge of reading, acquired through the Reading Recovery training and graduate level studies, would be of great value to him in the regular primary classroom to which he was likely to soon be reassigned.

While Sadie and Bernard's alternative teaching opportunities were somewhat opportunistic, evolving from personality traits or personal pursuits, Artie's were more the result of career planning – aided by support of mentors as well as serendipitous events. From the time she was first appointed to the Reading Specialist position, her professional development decisions were predicated on her desire to pursue a leadership role among teachers of reading. The post-degree certificate in reading and graduate studies she completed were

intended, she believed, to provide her with the credibility she felt she needed to be seriously considered as an instructional leader by school district administrators.

Prior to her graduate studies, Artie's primary focus had been learners in the upper elementary grades. However, her graduate studies had drawn her into practices for early literacy learners. This proved serendipitous in light of the provincial ministry movement towards early literacy initiatives. When the school district offered Artie the Early Literacy Intervention position, which eventually evolved into the AISI leadership opportunities, her belief about personal credibility and the graduate degree may have been vindicated.

Although Artie had been more deliberate about shaping her career opportunities than Sadie or Bernard, her status in the position she occupied was no more secure. When the shifting priorities, which also impacted the other two, were felt in Artie's district, her position was no less vulnerable. Where Sadie opted to retire, and Bernard stoically accepted the inevitable, Artie was devastated that her hard work and dedication was so lightly dismissed.

<div align="center">Leadership Experiences</div>

As I explained earlier in this work, when I began thinking about this study, one of the premises I believed to be true was that teachers who had studied reading as a specialization were highly knowledgeable about reading instruction and therefore were likely candidates for district positions and opportunities to guide fellow teachers in improving instruction. I wanted to know if and how such instructional leadership might happen in districts where consultants, reading

specialists or equivalent positions were unlikely to exist.  The conversations with the study participants revealed that teacher and literacy leadership, though not necessarily the ambition of the participants, were important parts of each person's teacher experience.

*Leadership Styles*

As I told the participants' stories in Chapter Four, I titled each story with a reference to the leadership style that I felt characterize his or her self-described approaches.  Sadie was the Rugged Individualist, who was very willing to share her beliefs and understandings, but only when asked, placing strong belief on teacher autonomy and being respectful of their perspectives.  The tendency for independent endeavours was perhaps initiated but certainly fostered during the kindergarten development period.  Although there were others doing similar jobs with whom Sadie collaborated throughout the province, the geography of north-central Alberta naturally created a sense of isolated independence.  Furthermore, though educationally focused and loosely connected to the schools, the initiative was triggered and managed by the children's branch of Social Services, removing Sadie from direct interaction with teaching colleagues and administrators.  In setting up the program, working with parents, and supervising the individual classroom instructors, she enjoyed a great deal of autonomy.  Her inability to tolerate the restrictive nature of her home country's school system was indicative of her increasing sense of individualism, and perhaps even maverick tendencies.  She commented, "I've always been that kind of maverick – head off on my own.

I don't want to do what you're doing, I don't want to be in lock-step with you."

Whether by design or simply serendipity, Sadie's eventual assignment to the

resource room allowed the already established solitary tendencies to continue.

Because she was not bound by a specific Program of Studies, her analytic nature

and creativity were able to flourish as she learned more about reading and

teaching.

This does not mean that Sadie did not interact with her teaching colleagues

or wish to share her passions, interests or ideas with others.  In fact, her initiatives

such as the assessment of the vocabulary level of every child in the school and the

Reading Cottage projects were aimed at all students, not only the struggling

learner.  Sadie recounted situations, when still a regular classroom teacher, where

other teachers would observe her students enthusiastically engaged in learning,

and would want to use the same techniques with their classes.  She happily shared

her ideas with colleagues in her own school, and in others around the district,

through workshops conducted at local teachers' Professional Development mini-

conferences and Alberta Teachers' Association sponsored workshops.  Doing the

presentations and experiencing positive reactions from the teachers gave Sadie

pleasure, "I was being real and giving them examples from a real classroom.  The

teachers were really excited.  I loved it – it was a natural high.  I loved

entertaining and sharing.  I loved inspiring them."

What further characterized Sadie's efforts was her belief that teachers'

autonomy was paramount, and that teachers would ask for help or reach out to

new ideas when they were ready.  She was fierce in defending teachers' sincerity

in believing that they were doing the best job that they were able to, and that they needed to be supported in their learning in ways similar to those used to support children in their learning.

Sadie felt most satisfied with her overall job when she had initiated four strands of literacy development.  For the whole school, there was the reading program (Reading Cottage); for a whole class, she would model and mentor the classroom teacher in some aspect of reading or writing instruction; for small groups, she would conduct some group remediation; and for the individual child, she implemented the "boosts".

Sadie had, at different times in her career, aspired to formal leadership positions but had always been thwarted in her attempts.  However, in the latter years of her career, Sadie's longevity as a staff member and her force of character, in fact, resulted in her experiencing many informal leadership roles.  As well as being called upon to share her expertise in reading, working closely with the principal to design and implement literacy and language arts strategies for the school, she also acted as a surrogate administrator. For example, she was called upon to assist teachers dealing with difficult parents, or to aid with the support of a struggling teacher.

With the obvious exception of his leadership role in Reading Recovery (prescriptive in its design), Bernard's self-reported style, which I have labelled *Leading from Behind*, was facilitative, gently nudging and supporting, but focussed on teachers realizing their collective needs and struggling to come up with their own solutions.  This is perhaps a reflection of his own career journey,

which saw him engaging in training that met his personal and professional development needs as he grappled with his own son's reading difficulties, as well as the problems experienced by the children in his classes. Bernard had not actively sought leadership roles in his professional life until he became fully involved with Reading Recovery and was encouraged and supported to become a lead teacher. Perhaps it was his strong belief in the efficacy of Reading Recovery as a tool to boost struggling readers' abilities that inspired him to become a leader. Uncharacteristically, as the Reading Recovery lead teacher responsible for training others to use the techniques, Bernard reported that he was inflexible in his requirements that the trainees follow exactly the prescribed process of delivery. He described the separation between the roles of trainer and leader like this:

> You have the Reading Recovery technique that you have to kind of get
>
> hold of in order to use the Reading Recovery approach. And of course the
>
> techniques are based on theory. There is some back and forth between the
>
> theory and implementation. But you still have to take this on as a whole
>
> before you can even begin to think of the larger issues. And teachers –
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> I've been thinking about this in terms of the role of the expert, as opposed
>
> to the leader. The teacher leader in Reading Recovery can only get to that
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> leadership aspect of bringing people to a different way of knowing when
>
> the expert stuff is dealt with. (The teachers) have to be comfortable with
>
> all of what Reading Recovery is.

He went on to explain that he told the trainees that they were taking on Reading Recovery and regardless of their beliefs and practices in their own classrooms,

they were in the training because they were expected to use the Reading Recovery

techniques as prescribed.  Only after the trainees had opportunities to practice and

reflect on what happened (over a considerable time), was he prepared to discuss

the pros and cons of alterations to the practice.

Where Bernard might more fully consider his activities as a leader, and

where his leadership style of subtle guidance was more evident was in the

Professional Learning Community (PLC) activities initiated by the Alberta

Initiatives for School Improvement. These activities involved planning for a

different model of instruction in the early literacy classrooms (grades K-2).  In

facilitating the groups, it was important to him that the teachers identify their

issues and spend time discussing and making decisions.  Although not completely

abandoning his own perceptions of what was needed (for example, he believed

that every primary teacher should have training in conducting and interpreting

Running Records), he was also prepared to allow the teachers to set their own

agenda.  He felt his job was to get the teachers reflecting on their teaching

experiences in order to be more aware.  One forum in which the subtle leadership

was evident was a voluntary, after school study group Bernard initiated, in which

everyone studied a particular professional book Bernard suggested.  In this way,

he felt he was able to bring the theory he had learned to the teachers who did not

have the advantage of university course study.  He encouraged teachers in the

group to use their reading as a platform upon which to be reflective about their

practice, and to bring their ideas and concerns for the group to explore.  Bernard

believed the group study helped teachers to better understand their practice, but he

also noted that some people did not feel that their participation was voluntary, but rather, mandated by the principal, a situation he felt was contrary to the principles of professional learning communities.

Bernard confessed that he felt he had not done a good job of facilitating the groups because he felt he'd been too much of the expert. However, he believed he'd become better over time, "I tried always to engage in discussion, but probably my understandings have changed in the last few months to a better, more inclusive, collaborative model than when I first started." His leadership processes were evolving.

The grade level Data Teams provided yet another way for Bernard to help teachers think about and improve their practice in a true social constructivist atmosphere. Leadership for this activity took on a different pattern than in the previous examples. Again, taking the lead, he organized a process where his primary teachers' group identified strategies they believed would help children learn. He, along with another Literacy Advisor, brought groups of kindergarten, Grade 1 and Grade 2 students together for explicit teaching and practice of the strategies, collecting evidence of how the children were using the strategies. He goes on to explain:

> Then I come back with the stuff the children were producing, and I was able to say, "Here, talk about this." They were actually getting kids' work and saying, "OK, he asked them to do this and this is what they did." It became really interesting because they tried to design a rubric around 'making connections' (one of the strategies taught). They found it hard to

do but there was a lot of discussion around it.  It's been very helpful and rewarding.

Bernard believed that by leading the Early Literacy Data Team, he could help the school division be well placed for the next batch of requirements he believed was coming from the provincial government's Ministry of Education. He believed he had some insights about what was in the planning at the ministry level, and he wanted to be proactive in supporting and buffering teachers against the next wave of demands he felt were coming. By acting as a coach to support the work of teachers, he believed the teachers would be more knowledgeable and prepared, and therefore more resilient to the ever increasing demands.  True to the philosophy of keeping the teachers in control of the work of the Data Teams, rather than setting the agenda himself, Bernard was becoming more practiced at the kind of leadership he wanted for himself.

As Artie matured in her career and was able to study and be creative with her practice, she found energy in developing programs and promoting these ideas to fellow teachers and administrators.  Her strong convictions and enthusiasm for what she was doing meant she wished to share her ideas and experiences with others, and through opportune circumstances, she was able to *Lead from the Front*.

Unlike Sadie and Bernard, Artie's teaching experience had been formed outside the regular classroom assignment, in the resource room environment of pullout remedial work.  This teaching environment enabled Artie to concentrate on specific areas of instruction, mostly math and reading, the latter of which had

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always been of particular interest for her. It also meant that her colleagues already saw her as separate – not a regular classroom teacher - which may have opened the door for her to promote her ideas about reading. As resource room teacher, she was also in the view of mentors and administrators, who were able to witness her enthusiasm for the topic first hand and to consider her for leadership roles when they arose. This combination of factors undoubtedly contributed to her opportunities for teacher leadership.

Artie also seemed to have a personality that relished leadership opportunities. She was a risk-taker, who capitalized on opportunities that presented themselves; for example, when she accepted the first teaching position she was offered in a place with which she was unfamiliar. She did not hesitate when potential leadership opportunities presented themselves, such as the ELI position and the later AISI initiatives, even though it meant developing her own program and 'selling' it to the players involved. It seemed the more challenging the proposition, the more energy she mustered to meet the challenges.

Although driven to provide the leadership for the various projects, Artie also consulted with and enlisted the support of fellow teachers. When she initiated the literacy readiness assessment, she brought together the kindergarten and Grade 1 teachers to decide what would be workable and how it could be done. In the later projects, she relied on the school coordinators to appropriately deliver the program. She also did not necessarily wish to take all the credit for the successes of the programs, making it very clear that she honoured and appreciated the hard work the others did. She spoke about the importance of recognizing the

leadership qualities of others and fostering this so that others could develop their potential. She liked to apportion credit to school administrators, recognizing their role in ensuring the success of projects.

Being considered a literacy leader by her school district administration was extremely important to Artie, but it was also important to her that her teacher colleagues accept her as a good leader. She felt that over the more than eight years she had been engaged in literacy leadership, she had maintained the support of the teachers because she "walked the talk…I'm right there messing around with them. " She also explained that she garnered teachers' respect for her message because she did her research, was confident in her knowledge and offered a consistent message over time.

Another important component of the kinds of change Artie envisioned was the inclusion of resources from outside the school division. She recognised that teachers often were sceptical of the outside "expert" with the grand solution for all the district's troubles. Artie was critically aware of the need to not "waste" teachers' time with professional development that was not helpful or well received. She was able to develop a reputation for the inclusion of good quality external resources, which she thought would further strengthen her credibility.

Artie's commitment to and intensity about her projects sometimes led to some frustration at teachers who were not as interested or committed as she hoped they would be. However, she also realized that she couldn't expect everyone to be in the same place in his or her life or career, and all to be ready for the changes

she wanted to implement.  She believed the results would speak for themselves and draw in the reluctant colleagues.

In discussing her leadership opportunities and aspirations, Artie was clear that she strove to not just lead, but to provide good quality leadership that would be helpful for teachers and advance the cause of literacy development for all children.  She spoke about the need to become a good listener, to hear what was said and, equally important, what was not said.

*Teacher Mentorship*

For all three participants, teacher leadership meant at least some level of mentorship of other teachers.  The extent to which mentorship took place was governed by the formality and extent of the leadership role.  Sadie, although a strong leader in her school, had the least formal role and mentored in a similar manner.  She helped teachers when they came to her for advice or wanted to learn strategies and techniques she used in her classroom or in the resource room instruction:

> People would come to me and say, "I'd really like to know how you do that, but I'm scared to even try."  And I'd say, "Well, why don't you try this first."  They knew that if they came, I'd share.  They knew I was very willing to be a mentor/tutor/help – demonstrate, model, go into the classroom.

She was generous in sharing her ideas and practices, but encouraged teachers to take what they learned from her and craft it into their own strategy, "I would tell

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them to only use this idea as a spring board - shape it and mould it and make it

your own." She believed that in order for someone to use an idea, he or she

needed to take ownership by "grow(ing) it yourself."

On occasions, Sadie's principal sought her assistance with mentoring a

teacher experiencing difficulty in the classroom. In one case, when she was still a

classroom teacher, she was purposely placed in the classroom immediately

adjacent to such a teacher. Although she described his approach as "benign

negligence", she knew he cared about the children. The classrooms were built as

an open concept school so the walls between classrooms were waist high. The

struggling teacher could casually observe Sadie's approaches to classroom

behaviour, as well as teaching strategies. She also spent time actually modelling

teaching in the other class, while the teacher paid close attention to what she was

doing. In spite of his obvious lack of teaching skills, Sadie appreciated his

willingness to try to do better. She felt that by following her examples, he was

able to improve his instruction.

As a result of her efforts in gaining expertise in teaching reading over the

many years Sadie taught in the district, she provided mentoring support for

countless new, as well as experienced teachers. Informally, she was recognized

by her colleagues, as well as by district administrators, for her excellent work and

generous sharing, though the informal recognition did not translate into success in

attaining the leadership positions Sadie applied for. It may be, however, that

instead of the formal position, she was given the latitude to pursue her own path

without interference.

The role of teacher mentor was definitely more formally recognized in the job descriptions for both Bernard and Artie.  By definition, teacher mentoring was the main task of Bernard's position of district Lead Teacher for the Reading Recovery.  It had taken him a full year of training to ensure his knowledge of the task.  One of the key components of the Reading Recovery program is its extensive teacher professional development.  It was his job to present and demonstrate the correct procedures, to introduce the theories behind the practices, and to ensure the Reading Recovery teachers-in-training were properly practicing the techniques with their own students.  Since the training was a social constructivist model, where the trainees practiced while their colleagues observed and provided critical feedback, Bernard's job was to facilitate and direct the feedback given to the teachers-in-training.  As well as the group experiences, he was also expected to provide individual help when a Reading Recovery teacher was experiencing difficulties with a particular child.

Bernard's work as Literacy Advisor also presented opportunities for mentoring, though, as discussed in an earlier section, he crafted his interactions as more collaborative, social constructivist learning activities.  As well as providing the guidance concerning reading instruction, he also crafted the structure for the learning community's work.

For Artie, mentorship constituted an important pillar of her career.  In the discussion of the various stages of her development as a reading and literacy leader, she highlighted individuals who informed her practice and encouraged her along certain roads. She eagerly offered credit to those she felt had helped her.

Because of her high esteem for the mentors in her own life, Artie was keen to provide the same kind of encouragement to others who she felt had strengths for understanding children and reading, and more particularly, for those with leadership potential.  She felt that she had a talent for spotting this kind of teacher.

Although her tasks in the ELI and AISI projects were primarily intended for larger audience participation, Artie was always willing to answer the requests of individual teachers for help with the strategies she promoted.  From her early days of the Reading Specialist assessments, Artie not only made recommendations for how a teacher might deliver remediation, she liked to get into the classroom and actually model the techniques she was suggesting.  In fact, one of the drawbacks she noted concerning the Reading Specialist position was that it was too far removed from the teaching.

For each of the projects from the initial ELI activities to the AISI initiative, Artie provided mentor support to the teachers, as well as conducting workshops where she modelled early literacy activities for parents, librarians and childcare workers.  She trained and supported the teachers using the Readiness Assessment measure.  Being the designated trainer for the Balanced Literacy program meant that Artie was specifically required to provide mentorship for the participating classroom teachers.  She was expected to be present in the classrooms in order to model techniques and critique the teacher-trainee attempts at using them.  Whether a Balanced Literacy teacher, or another teacher who wished to solve a reading instruction problem, Artie was always ready to help, "As long as it was literacy related, I felt it was my job."

Over time, Artie has progressed from classroom teacher, to reading specialist, to consultant, and finally, literacy leader. Each step moved her along a continuum that altered the learner group with whom she primarily operated: working directly with the students on a daily basis, working with students as an assessor, providing in-service training and one-on-one assistance for teachers, and finally, teaching and supporting a cadre of school based teacher leaders delivering a specific program overseen by Artie. With each step had come more and more leadership responsibility. Artie was very excited about the experience of guiding, facilitating and mentoring the school coordinators of the district-wide AISI project referred to as Constructing and Expressing Meaning. A significant part of the mentoring process was intended to ensure that coordinators were familiar with the topics and strategies of the CEM project and were fully equipped to provide direction to their school colleagues. Artie identified leadership capacity building as a very positive, though unintended, outcome of the project. She was particularly interested in her work with the teachers because of her own earlier experience, "That's how it happened with me. Someone saw me in a different way. I was able to go down that road (teacher leadership)." Artie also drew from her own experience when emphatically insisting that the teachers she worked with be given credit for their work.

## Ultimate Disappointment

As I listened to Artie, Sadie and Bernard tell their stories and then read and reread the transcripts of our conversations, it was very clear that all three

were excited, dedicated advocates of literacy and teacher development in the field of reading instruction.  They all loved the work they did with the learners, sought greater levels of understanding so that they could do a more effective job of helping children to read, and wanted to use their know-how to improve the teaching capacity of their colleagues.  They had been given the opportunity to accomplish all these things, to some degree, but in the end, all faced the prospect of disappointment and unfulfilled potential.

Within her long teaching career, Sadie's disappointment had been cumulative.  Her early career started with great potential for leadership (youngest assistant Head Teacher in the region).  Unfortunately, her relocation to a school jurisdiction that recognized her leadership only when needed and on their terms (e.g., the project to develop the Kindergarten program) meant her leadership potential was undeveloped.  Her attempts to continue her role of teacher developer through positions in the district's central office were repeatedly thwarted.  Each time she was passed over, she withdrew further and further into her individual work, pursuing increasingly more advanced study. She was, however, able to incorporate the new learning into her practice in the remedial classroom in which she taught.

The further study made Sadie even more suitable to the teacher leadership role she ardently pursued. She wanted to help teachers be more skilled at their work of helping children become literate.  She tended to do things differently than was the common practice in her district, introducing new ideas and practices because she believed in them.  She wanted to share these ideas with teaching

colleagues because she believed it would make a difference in the quality of teaching. But she also believed that teachers did the best they could with the time and knowledge they had to give to a task. Her graduate studies in teacher change convinced her that change is a very personal thing that should not be forced on teachers, but should be introduced in a gentle way, with small movements towards change. Sadie believed that she could have made a significant contribution to the quality of reading instruction in her district had she been formally assigned the leadership role, but also believed that her abiding respect for teachers and their rights to set their own professional development agenda would likely be at odds with the district administration. Had she been hired to a leadership role, she felt that her approach would not have meshed well with the district administrators and their approach to teacher change. It is possible that Sadie's uncompromising and somewhat outspoken approach may have hindered her attempts at the administrative position. There could also be an argument for negative gender and role stereotyping biases (female, primary grade teacher), since the administration was exclusively male and drawn from people who had taught at upper elementary and secondary levels.

In spite of the possible difficulties Sadie speculated on, in hindsight, her unsuccessful attempts to secure district administrative positions left Sadie bitterly disappointed and disillusioned with the district administrators. She felt she could have done so much more for the teachers in the area. In fact, after the final rejection, she left the district for four years to study at university and to teach pre-service teachers. She eventually returned to her school district because she

missed the interaction with the children.  When our final interview came to a close, I asked her what her most significant accomplishment as a reading specialist had been.  She responded with a passionate, moving, uninterrupted, 18-minute review of the work she had done with struggling readers, teachers, parents and the school community.

Bernard had a very different relationship with teacher leadership. Although he had sought to find ways to better teach literacy to his students, his aspirations for leadership came to him well into his career as a result of his belief in the potential of Reading Recovery to significantly help struggling readers.  His personal pursuit of Reading Recovery, fortunately, coincided with initiatives to increase early literacy skills for young children.  He was able to position himself to become a Reading Recovery (RR) Teacher Leader in order to ensure that the program was made available in his school district.  The RR training he received, in turn, inspired him to further extend his learning about the theory behind the reading practices.  When the opportunity for literacy leadership presented itself, as a result of the Early Literacy Initiatives, Bernard was eager to share this new knowledge with his teaching colleagues.  As a guide, rather than a leader, he enjoyed the opportunity to help his colleagues become more reflective in their classroom practices and more proactive in their problem solving towards making improvements in student achievement in reading and writing.  Although he claims to have been very directive in his approach to teacher learning, he explained that he'd moved away from the 'expert' role to the more collaborative endeavours of Professional Learning Communities (PLCs). He helped his colleagues identify

their own group issues, then provided suggested resources to address these issues, while at the same time, learning along with his colleagues. He was also able to support his colleagues in developing their capacities as a 'Data Team' that could collect high quality information to inform their teaching.

In spite of these obvious leadership activities, Bernard did not believe that his work or opinions garnered much respect, either with administrators or teacher colleagues. To some extent, he explained, the Reading Recovery program was to blame because the teachers did not see the strategies used with the children, so didn't fully understand what was taking place. Nor did the program provide structures for Bernard to work with the teachers to show them how they might use similar techniques in their whole class instruction. Furthermore, he felt that the administrators thought him too abstract as well. He explained, "I said, really, every teacher at the primary level should know how to do a running record. And they'd say 'Hum, ya, we should do that,' but then there was no structure to do it." He went on further to speculate that because he didn't provide both teachers and administration with the kind of answers they wanted, they had difficulty accepting the ambiguity of the help and advice he gave.

Bernard also voiced concern that the district was moving away from a focus on literacy, to other content areas and professional development interests. As he saw his own allotted time for Reading Recovery reduced and the direction the district school improvement planning was heading, he worried that the district would lose the language arts and literacy expertise that was in place. He was also coming to terms with the fact that his time as literacy leader was coming to an

end, as his work assignments focussed more and more on school based special needs management and straight classroom teaching. The class assignment was not at the primary level where the Reading Recovery interventions were targeted, but at a higher elementary level. "So you can see, in terms of my central office involvement, that I'm almost completely out of it. I say, that's OK with me." He was still very interested in working with teachers to develop their skills but he did not want to do it "in a climate where teachers are feeling overwhelmed by the amounts of professional development that they have to do – it's no fun!" Although resigned to the shifts in district focus away from literacy, he hadn't abandoned all hope, though he found it difficult to make time for literacy work: "my time is so limited here getting my paperwork done, but I keep thinking I'm going to have time to work with teachers, but I never seem to have."

Although both Sadie and Bernard conveyed stories of disappointment that they were not able to do the quality of work they wished to as teacher leaders, it was Artie who experienced the most profound sense of disappointment and even betrayal. Artie invested considerable time and energy accessing the fundamental skills she believed she needed to fulfil reading leadership roles. These efforts did not go unrewarded. Initially she was hired to a half-time reading specialist position, maintaining her former Special Education deployment for the rest of her teaching assignment. Although really happy with the job, it rankled that the psychologist and the Early Childhood Specialist positions were both full time, while the reading specialist was part-time. When local politics and broader economic pressures resulted in the elimination of the position, and Artie was

expected to simply return to full time teaching, she did not respond well.  She

reacted to it as a personal defeat, despite the fact that reading specialists

throughout the province, including her original mentor were losing their specialist

designation and were expected to return to classroom teaching.  She commented,

"I felt I was going backward – I'd worked so hard."

Although the specialist position was gone from the district organization,

Artie maintained an optimistic stance, continuing to up-grade her education

relating to reading instruction.  Her optimism was not misplaced, and once

funding was again available for literacy endeavours, she was recruited to develop

Early Literacy programming.  In spite of the fact that the project was allocated

only one day per week, again she threw herself into the project, and toiled to

establish her credibility with the Division 1 (Grades K to 3) teachers.  Perhaps

because of her success with the ELI initiatives, Artie was once again recruited to

the district's AISI projects, a fulltime position (Special Education was no longer a

component of her teaching assignment).  In Artie's mind, she had arrived at the

place where she felt she could do the best job for the district.  She had established

a high level of credibility with the Division 1 teachers, and was having Division 2

people approaching her for advice on classroom and individual strategies.  The

second AISI cycle project (CEM) brought her to the attention of the Secondary

teachers.  Teachers throughout the school district sought Artie's advice for

working with struggling readers.

Even as her involvement in district reading improvement initiatives and

exposure to the entire school district instructional team expanded, including

participation in the Management Team decisions, she remained a 'coordinator' for

AISI. Reviewing and comparing the positions of other specialists within the

district with her own position, she pressed for elevation to Consultant, and in fact,

was promised such a move, once other structural reorganizations had occurred.

Although reassured by her supervisor that it was simply a matter of time, she did

maintain some scepticism, admitting, "I don't know that if there was no money

one day for AISI, if there will be a literacy consultant. It's amazing to me that

you wouldn't have a literacy consultant in your school division!" This scepticism

may have been fuelled by a growing feeling of unease concerning her relationship

with the Superintendent. She commented at one point that although she enjoyed

substantial support from the School Board, she did not feel the same support from

the Superintendent, "I get (credit for success) from everybody, except from my

Superintendent. I don't know why."

However, as time passed, a shift occurred in the district priorities

(inception of a new AISI cycle meant a shift to priorities other than literacy), and

in the change, Artie's significance in the district administration was eroded. She

was never offered the reclassification, and in fact, was removed from the

Management Team meetings, and assigned to work in a unit along with the other

student assistant services, though still not as a Reading or Language Arts

Consultant. In spite of what she saw as support for her work from teachers at all

levels of instruction, principals, and Board members, once again her hopes and

aspirations were dashed. She was left feeling devastated and betrayed by the

administrators with whom she had closely collaborated for approximately eight

years. When her position was redefined, she was to be part of a Student Services team, which included the Special Education specialists, providing services to teachers and students in schools, but at arms-length from the administration.  She was still expected to provide support for Balanced Literacy and the continuing Constructing and Expressing Meaning project, but with no extra funding to support these initiatives.  This meant no workshops or coordinator release time to ensure their local school support.

In her attempt to explain the shift in support, she commented that because she had maintained her close ties with schools and teachers, always in the school providing support to the CEM coordinators, and conducting workshops for teachers in their own schools, she was not visible to the administration, "I was always in the classrooms. They (the administration) never saw me as an administrator – I was not visible, and when you're not visible, you get crushed!" Reflecting on her disappointment, she reminisced that a few years previously, she had been encouraged to take an administrative position, but had decided against it because it entailed "paper-pushing".  She went on to explain, "I wanted to move the Division.  I didn't want to just count heads and make sure we had the money." This decision was reinforced when she "saw people doing things they hadn't done before", and moving ahead in their own development.  Ironically, she also commented that as her position eroded in management circles, she found her own self-confidence waning when giving workshops.  In the final analysis, she felt she had been "used" by the School District.

*Psychologists and the Expert Down the Road*

In the discussion of district roles for reading specialists, a recurring theme was resentment about the significance placed on the psychological testing of students, while the work of the specialized teacher of reading was devalued. Sadie humorously suggested that the psychological consultants hired to perform the diagnostic reading assessments for the really struggling learners ought to be embarrassed to be charging the large fees for the reports that basically repeated some combination of the same five results. Artie was appalled and disillusioned by the inequity of treatment given the Psychologist and Reading Specialist positions in the district. While the psychologist was a full-time position, the reading specialist was only afforded two or three tenths of the teaching assignment to cover the needs for the whole district.

Bernard also resented the esteem in which the psychologists were held over the teachers who had gained greater knowledge in reading instruction. He too felt that it was inappropriate for the psychologists to "play reading teacher" when their recommendations for remedial instruction were limited in scope. In fact, his frustration at the lack of acknowledgement of the complexities of learning to read caused a crack in his usual balanced acceptance of the way things were:

> You trained as reading specialist and you get some knowledge, and you feel you're growing. And you try to help out in the school. And you really feel like you're starting to get a handle on the things. And then the teachers will ask for an outside assessment from a psychologist. And all

your stuff and everything you've done is totally irrelevant.  All of a sudden the psych assessment is the be-all and end-all and you're just a piece of dirt.  All you've done is not worth thinking about; it's not worth anything.  That's really hard to take because you know that what you have to say could make a difference. But we've got these systems in our brains about what is valuable and what isn't.

He further illuminated his difficulty with the psychological assessment emphasizing the high costs of the assessments, and the actual quality of the reports generated.  As classroom support teacher, he was in a position to read the reports:

It's quite interesting reading the psychologists' remarks, how psychologists play reading teacher, but their suggestions on how to help struggling readers are everything across the map.  They seem to think they have a handle on this, but most are way out there.

He lamented that even if an assessment showed a child to have a learning disability, the coding did not result in further classroom support, and the child ended up with a label that might not always serve him or her.  He contrasted the labelling approach with that of the reading specialist who acknowledged that the child had a reading difficulty, then set out to find ways to connect with the child to facilitate his or her reading acquisition.

The topic of professional development presentations was another touchy point for Sadie and Bernard.  Although it was a less vitriolic discussion than that of the psychologists' influences, both Sadie and Bernard made ironic comments

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about how little their expertise was valued and utilized for professional

development within their own school districts. Both made similar comments that

school district administration had not asked them to share their knowledge

because they "did not live 50 miles down the road", a metaphor for the idea that

experts always came from somewhere else. Even more ironic was the fact that

Bernard had been asked to speak at a conference a thousand kilometres away in

another province.

Artie had a different perspective on the 'expert' other. During her tenure

as Early Literacy and later Alberta Initiative for School Improvement coordinator,

she had been a strong proponent of providing what she considered high quality

professional development for the teachers in the district. This professional

development included provisions for presentations and workshops by some of the

well-known 'experts' in the field of reading and writing "(the teachers) knew I

only brought in high quality speakers". Furthermore, she encouraged the teachers

to read and use the books written by these presenters when they moved to enhance

their practice. Unlike Sadie and Bernard, she was able to create her own

opportunities to lead workshops and professional development sessions within the

bounds of her coordinator position. In doing this, she created a culture in the

schools that recognized her expertise, and encouraged teachers to take advantage

of this expertise. Having combined external expertise with her own teacher

leadership, Artie did not voice the same disdain for district professional

development the other two participants did.

However, in discussing the role of the psychologists, Artie was no more enthusiastic about their influence in the district than the other two. Perhaps because she was a Special Education teacher, she was less critical of the work of the psychologist than Sadie and Bernard, but she resented the policy that made the position full-time while the literacy coordinator was only partial time. Furthermore, in both cases where Artie found her literacy specialist positions terminated, the psychologist positions were continued. She felt "they'd kept the wrong position."

The individual stories Sadie, Bernard and Artie tell provide an interesting narrative about their professional lives, but in viewing them together through the lens of the four recurring frames, the stories also reveal a larger picture of professional teacher leadership opportunities gained and lost.

CHAPTER SIX

DERIVING MEANING

I began this study with a question about how teachers with a reading specialization had used their expertise to advance the quality of instruction in non-urban schools and school jurisdictions. I knew they likely had a wealth of knowledge that could help other teachers better address the learning needs of children as they learn to read and further develop as readers. The initial overarching question guiding the study was:

- What are the professional experiences of classroom teachers with a reading specialization in non-metropolitan school districts?

I wanted to learn:

- how the participants used the knowledge they gained through graduate level reading and language arts courses in their practices as teachers of reading.

- what participants considered to be their contributions to literacy education in their schools or regions.

- what kinds of collegial experiences (focussed on reading instruction) the participants had in their schools or regions.

The conversations generated by these questions revealed the professional stories of the teachers in this study. From these stories, I have constructed my understandings of the place of these teachers in their non-metropolitan school districts.

During our conversations, Sadie, Artie and Bernard, the participants in the study, revealed the winding tales of their careers from 'humble' classroom teacher beginnings, through the excitement of learning and professional growth that led them into situations of instructional leadership. If the stories had ended on this high note, I would have been buoyed by the assumption that reading instruction in the participants' school jurisdictions was on a sound foundation with support from these knowledgeable and enthusiastic teachers. Unfortunately, the stories continued on a decidedly more disappointing note. In all three cases, the promise for developing better quality reading instruction through shared knowledge was only marginally realized, and in the cases of Sadie and Artie, resulted in deep personal disappointment.

In this chapter, I discuss my sense of the significance of two of the themes that emerged from the study. As I sought to place the participants' stories in a context of teaching reading and teaching others to be better teachers of reading, I became aware of the overarching themes of teacher leadership and career disappointment. I will follow this discussion with a personal reflection on the substance of this study, along with some recommendations for further research and a brief conclusion.

Teacher Leadership and Career Disappointment

In Chapter Three, I discussed how difficult it was to find appropriate participants for my study since there were very few teachers in the non-urban school districts who had completed graduate studies in reading. I supposed that

the dearth of individuals in the target group was due, in part, to the logistical difficulty of attending a full-time university program away from work and family obligations. After completing lengthy interviews and examining the conversations, I began to wonder if there weren't some other fundamental reasons for the small number of teachers who seek to develop an expertise in the teaching of reading, and perhaps by extension, other curricular areas of study.

Unlike those who seek leadership through a direct administrative career path, Sadie, Bernard and Artie's routes emanated from their passion for helping readers negotiate the complexities and curiosities of acquiring literacy skills. The eventual teacher leadership opportunities that came to them were evolutionary products of their own drive to share what they had learned. In doing so, they helped teachers solve their own dilemmas about reading instruction and helped children's 'learning to read' experiences be more successful.

In their leadership roles, Sadie and Bernard seem to avoid the pitfalls of crossing the cultural norms of teaching, perhaps because the kind of leadership they offered was accessed most often voluntarily. Artie, though available to those requesting personal help, was also involved in programs that mandated specific practices. However, having been instrumental in designing the programs she implemented, she was totally committed to the work of convincing others of their value.

From Artie's, Sadie's and Bernard's stories, I believe that all three individuals set out on their initial journey with little thought of fulfilling the traditional conceptualized notion of leadership; that of Language Arts or Reading

Consultant.  But their passion for helping children learn to read and their endeavours to better prepare themselves for the job could not be contained within the solitude of their own classrooms.  It naturally spilled into their school buildings, their districts and beyond the boundaries of their regions.

As discussed in earlier chapters, Sadie's, Bernard's and Artie's involvement in leadership in reading instruction began informally with requests from colleagues for specific skill or strategy sharing. In a similar way to the participants in the Lambert et al. study (1997), Sadie, Artie and Bernard did not think of these activities as teacher leadership, but instead, thought of them as collaborative engagements that characterize most school communities where teachers strive to work together.  Since formal recognition of the leadership potential, particularly in the form of designated positions in the school division, was not part of the landscape, the informal encouragement from colleagues and, to some extent, principals, was significant for them in sustaining their enthusiasm for sharing their knowledge.  Since these roles were not initially formally recognized through such supports as release time or promotion, Sadie, Bernard and Artie did not face the dilemmas encountered by the participants in the Donaldson et al. study (2008).

Without the official distinction of 'expert', the participants in my study were able to build on their own learning, experimenting with new ideas and practices, and informally influencing the teachers around them in their schools. Where there were detractors among their colleagues, it mattered on a personal level (for example, Sadie's comments about wanting to avoid being "Mrs. God-

Down-The-Hall"), but had limited effect on Artie's, Bernard's and Sadie's personal practice and interactions with colleagues. So, although the three teachers did not face the negative collegial consequences found by Donaldson et al. (2008), the lack of formal recognition of their expertise also meant that their ambitions to build understanding about the teaching of reading with their colleagues was limited, or in the particular case of Sadie, was stifled. What was particularly interesting in the cases of Artie and Bernard was the fact that the collegial detractors were teachers in the schools with which the two had the closest ties.

There are many commonalities between the circumstances of Sadie, Artie and Bernard. For example: none of the school districts had designated curriculum specialists, such as language arts or mathematics specialists; similar outcome mandates/initiatives and funding opportunities were available to all districts; and all three of the participants had experienced many of the same university courses. In addition, the participating teachers were keen to see instructional practices change and were willing to offer advice to administrators on actions the districts might wish to adopt and support for fellow teachers wanting to improve their practice. It might be reasonable to assume their leadership opportunities would be relatively similar. However, their stories tell me that each person created very different environments for practicing leadership opportunities. These unique environments were the product of the school districts' varying approaches to the challenges of children's literacy development, but they also reflected the differences in the personalities of each of the three individual research

participants. Not every teacher with special or advanced skills wishes to be a leader, but there are those who do. Good administrators can recognize the potential. School district administrators need to embrace the willing teacher-leaders and capitalize on the value they can bring to the whole district.

*Leadership Style*

Just as there is no 'one-size-fits-all' instructional program in reading, the results of this study show that many different leadership approaches can provide support for helping teachers to become more skilled at their craft. In Chapter Three, I used analogies of leadership style to help describe the approaches of the three teachers. Sadie was the *Rugged Individualist*, who, though interested in helping and leading others, was thwarted in her attempts, and so, retreated into the program she developed for her remedial students. In a regular classroom setting this would likely have manifested itself in Sadie shutting her door and operating as she saw fit. Donaldson et al. (2008) explains this individualism as maintaining the traditional teaching norm of autonomy. However, since Sadie's work was an extensive and intensive pull-out program for all needy children in the school, the image of total independence from the school community defied the realities of the situation. So, rather than Sadie having physical independence, she honed her individualism through her expectations that other teachers in the school would accept her operating practices – a somewhat flexible pull-out schedule, monopolization of the teaching assistance personnel, and limited social engagement with other teaching staff. Generally, the school principal supported

Sadie in this practice. In exchange, Sadie was supportive of other teachers'

autonomy in their classrooms, as long as it didn't interfere with her practices.

When the school environment changed with the migration of grade 3 children and

their teachers, and the design of the program was under attack, Sadie was not

prepared to compromise her autonomy and opted to retire instead.

Bernard, as the *Leader from Behind*, was the least overt in creating his

leadership role. He came to it in small steps, and only when he vehemently

believed that the approach he was using was really beneficial to young learners.

Furthermore, he initially saw his leadership as a service to a more select group of

teachers - those who were to implement Reading Recovery in their schools.

However, as he developed his leadership capacities and learned of social

constructivist processes, the idea that he could be of broader service to many other

teachers slowly developed. It was in this second leadership capacity that Bernard

sought to facilitate his colleagues' quest for better reading instruction.

Artie's leadership aspirations took shape early in her career and her

subsequent decisions concerning professional development were mediated by this

stance. As a result, Artie's leadership style was one of *Leading from the Front*.

Encouraged by mentors, Artie made herself available for leadership positions.

Early setbacks only stiffened her resolve to appropriately position herself for the

leadership jobs when they presented themselves. Artie embraced what she

learned in graduate studies, and was eager to incorporate ideas learned there into

the teaching practices of the school districts' classrooms. Her enthusiasm and

propensity to model practices in classrooms while coaching teachers made her a

valuable asset to her teacher colleagues. She was emphatic in her belief that part of her leadership role was to acknowledge the accomplishments of others and to foster the development of leadership capacity by encouraging others who exhibited leadership tendencies.

Of course, it is not reasonable to expect that different individuals will exhibit identical leadership styles, even when they have similar education and training and are engaged with similar content. Different personalities and experiences account for the differences identified in this study. What is consistent is that all three people offered and delivered vital and energetic assistance to those children who encountered the reading specialist or the programs they initiated. This study has shown me that my ideas about the roles of reading specialists need to be greatly expanded and need to be more inclusive. School districts need diagnostic information for the purpose of accessing funding for classroom supports, but the reading specialist has so much more to offer to the individual reader as well as to the classroom teacher. Teacher leadership in the era of professional learning communities is a valued commodity. Promoting and fostering the leadership capacities of teachers with special education and leadership interest and aptitude would seem an effective policy for school districts seeking improvement in overall instructional practices. Reading specialists could easily fill these leadership roles.

Just as the participants in the Lambert et al. (1997) study experienced

resistance and envy from some colleagues, Sadie, Bernard and Artie experienced

some lack of acceptance of the expertise they had worked to develop and were

willing to share with colleagues.  Lambert et al. speculate that it is the nature of

the teaching profession that prevents the recognition of expertise within the ranks

of teaching colleagues.  They explain it in the following way:

> Experienced teachers develop areas of expertise, but the nature of the
>
> profession does not encourage formal dissemination of teacher knowledge.
>
> Teachers like to talk about new ideas with colleagues, but not at the risk of
>
> stepping away from the others by cloaking themselves in the mantle of
>
> expert. (p.120)

It is possible to speculate that Artie, Sadie and Bernard might have

enjoyed greater esteem among their colleagues and found more teachers interested

in accessing their expertise if there had been greater support and recognition from

their school district leaders.  Had the district administrators found ways to

productively tap into Sadie's vast knowledge of emergent and early readers and

writers, and her enthusiasm for teaching to support the novice teachers, as well as

the veterans open to changes in their practice, it's likely that lasting meaningful

change in reading pedagogy would have occurred.  In Bernard's case, the school

district supported and encouraged him to attain the necessary training in Reading

Recovery, which eventually led him to the further study of reading theory.

However, eventually Bernard's knowledge was no longer a part of the larger

district plan, and he was expected to move into other jobs. Artie enjoyed the most complex and longest term of recognition as a knowledgeable teacher of literacy, but it became clear to her that in the absence of an appropriate permanent leadership position in the district, there was no real appreciation of how her knowledge could have enriched and extended an understanding of literacy instruction district-wide.

If the school district administrators had valued teachers who engaged in graduate level university courses, might colleagues have been more inclined to honour the different knowledge? Would such consideration serve as an encouragement for others to seek similar levels of professional education? The larger the critical mass of people working from a similar place of understanding, the greater the opportunities for the children's learning to move forward.

*Expertise from "Outside"*

Fullan and Hargreaves (1996) define teacher leadership as "the capacity and commitment to contribute beyond one's own classroom" (p. 13). Certainly Sadie, Bernard and Artie embraced this notion. All three were enthusiastic in implementing the changes in reading instruction they had come to know about and believe in through their continuing education. But in spite of their education and willingness to share knowledge, they were not positioned as 'expert' enough to be recognized as such by their respective administrators or, in some cases, by their teaching colleagues. Although not a central theme in this study, both Sadie and Bernard commented that they did not think they were 'expert' enough to be

recognized for their skills and knowledge because, as Sadie said with more than a little bitterness, they "did not come from 50 miles down the road".

Teacher leadership is founded on the belief that teachers within the system should be involved in designing and delivering change efforts. The difficulty of colleagues recognizing the 'expert' among the local familiar cadre of teachers makes the differentiation of 'expert' more difficult (Wasley 1991). Wasley suggests, "staff development programs encourage the notion that outside experts are best suited to encourage professional growth; the result is that insiders are not recognized as important or powerful" (p. 167). It seems that district administrators were willing to spend large amounts of money on the external "expert", with what appeared to be little thought of the internal resources available (Lambert et al., 1997; Wasley, 1991; Fullan & Hargreaves, 1996). Since the teachers were reluctant to see themselves as experts, and the administrators did little to promote that distinction, it may have been a self-fulfilling reality that other colleagues would not perceive expertise in their midst.

In contrast, Artie relished her position as a teacher leader and attributed her circumstances to the fact that she had developed an expertise through her earlier program management, as well as her knowledge of reading. More importantly for Artie was her knowledge of the work of key figures in the field of reading study. She was in a position that allowed her to invite into the school district, the authors of the books she was studying with colleagues, or those whom she thought would interest and enthuse teachers about various ways to teach reading and writing. Artie acknowledged the negative perceptions of "expert"

often associated with professional development presentations, but believed that her reputation for engaging high quality presenters mitigated the negativism. She didn't discount herself as "expert", but defined her role as that of facilitating whatever measures were required to accomplish teachers' learning.

Where Artie, Sadie and Bernard had similar reactions about the 'outside expert' was in consideration of the psychologists and instructional leadership in their respective districts. All three believed that the psychologists who performed assessments for the school districts had no business commenting on methods of reading instruction for the students they tested because they did not have sufficient qualifications in reading. While Sadie and Bernard were sardonic in their dismissal of the often expensive psychologists' reports with regard to their value to reading remediation, Artie was mystified by the decisions that maintained district specialized positions for psychologists, while cutting those of district reading or language arts consultants. The seemingly disposable nature of the curriculum specialist may have further undermined the credibility of the work performed by specialists such as the participants in this study, and perhaps in the long run, would have discouraged others from pursuing similar graduate studies.

*Career Disappointment*

In the portions of the stories regarding discussions of school and district administrators' perceptions of Sadie's, Bernard's and Artie's work, I could not dispel a sense that teacher knowledge was not held in very high esteem, even when that knowledge had been fortified through graduate studies. Although there

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was tacit support for the three teachers from their respective superiors, it seemed fleeting at best. It could be argued that the undervaluing of knowledge was actually the root cause of the disappointment and disillusionment felt by the three study participants.

It was apparent that, at points through each person's career there was a recognition of the knowledge and enthusiasm that each of the three displayed. Bernard was encouraged to pursue the Reading Recovery training that he had initiated and to share it with other selected teachers in the district. Artie was appointed to specialized reading positions, albeit of limited extent and/or duration (half-time reading specialist, one-fifth early literacy specialist and eventually full-time AISI coordinator). Sadie conducted a principal-supported resource pull-out program. Unfortunately, in spite of each of the three wanting to continue their special work with teachers and children, all were released back to the regular classroom when the district focus shifted. For Bernard and Artie, although they believed their work was respected, as the district priorities changed, both noticed support for their ideas drifting away. There was no apparent lasting legacy in the practices of the school district that significantly reflected the work that each had done. It was as if the district management had, like magpies, spotted a different shiny object (the 'new' project initiated) to collect. As professionals who had worked hard to develop a knowledge base, this casual dismissal of the plans Sadie, Bernard and Artie had developed and delivered was a slap in the face. Sadie's case was a more direct rejection, as people far less qualified than her were given the leadership positions she had sought.

Although the design of this study does not allow for an evaluation of how school and district administrators valued the work done by Sadie, Bernard and Artie, it is clear that all three participants believed that the lack of acknowledgement had a lasting impact on the culture of reading instruction in the school jurisdictions. If, indeed, the administrators had placed high value on the knowledge the three possessed, it was certainly not obvious to them. The irony is that when literacy once again becomes a district concern, administrators will be looking for their most knowledgeable teachers of reading to once again devise interventions to help students succeed in learning to read. If Sadie had not retired, if Bernard had not followed the same action, and if Artie had not abandoned her school district to find other, more satisfying work, it is likely these three individuals would once again be called upon to provide temporary leadership.

Reflections

In Chapter One, I noted research that identified the importance of highly qualified teachers in the improved reading performance of children (Dole, 2004; Allington, 2002). The three participants in this study had advanced academic and professional qualifications beyond those of most classroom teachers. As well, their actions and ambitions were fueled by their deep desire to improve reading instruction for all children. As a result, they all stepped, to varying degrees, into the role of teacher leader, hoping to advance the learning of their teaching colleagues. Based on my interpretation of conversations with the participants, the degree to which they felt they had succeeded in this role depends on where in the

timeline of their career you seek this information. I would suggest that all would say ultimately that they were never able to make the impact on teaching and learning that they had wanted to do. Furthermore, in spite of the valuable knowledge they could offer to the teachers in their schools and school districts, they found that as they outlived their perceived usefulness to the district, they saw no plan for their continued service as teacher leaders and anticipated a return to assignments in solitary classrooms.

Although the circumstances of the participants in this study were different from those in the studies conducted by Wasley (1991), Lambert et al. (1997) and Donaldson et al. (2008), Sadie's, Bernard's and Artie's experiences parallel the situations of the teachers in those studies. The failure of fellow teachers and school and district administrators to recognize the value the three brought to their respective situations hastened each person's consideration of departing the profession (early retirement or reemployment). Ultimately, it meant that the children in the districts lost supports that may have made a positive difference in their attempts to learn to read and write.

Improving the reading and literacy learning experiences for all children is undoubtedly one of the main concerns of most teachers, as well as school and district administrators. The better prepared and educated classroom teachers are, the greater the opportunity for children to succeed in learning to read. Not only were Bernard, Sadie and Artie highly qualified in reading instruction, they desired the opportunities to use their knowledge to provide leadership to others. The failure to use valuable teaching resources to their greatest potential would seem to

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be a failure of leadership on the part of the school district administrators. It is unfortunately true that not every teacher is interested, willing or able to continue studies that would advance his or her teaching skills in reading, or is interested in passing on this knowledge to others. On the other hand, teachers like the three study participants have much to share if the opportunities are available, and the school and district culture fosters a climate of sharing. For example, school jurisdictions could provide release time for teacher coaching opportunities, or sanction and promote professional development opportunities that use internal expertise to introduce and model different practices. These practices could then be widely supported across the district. Recognizing that small school districts are unlikely to be able to afford reading specialists, the smaller districts could structure advisory groups that take advantage of the reading expertise available within. Such recognition would demonstrate the value of the specialists' knowledge and raise their credibility with teachers and administrators. Actions such as these would demonstrate a longitudinal valuing of teacher expertise, which, over time might encourage other teachers to pursue more formal professional education, thus expanding the pool of expertise available to assist learners in classrooms.

Unlike many of the other professionals involved in urban settings, the Reading Specialist in the non-urban community works in isolation, without colleagues who have attained the same level of specialization. Bernard recognized this in his comment about the credibility of teachers being undermined by the lack of a common voice. There is a role for a group like the Northern

Alberta Reading Specialist Council, which is primarily situated in Edmonton, to support and advocate for teachers outside the urban setting, as well as to identify and encourage dialogue on reading issues that would highlight the value of such expertise in school districts. Another possible mechanism for collegial support might be found in the development of a Specialists' Council for the Teaching of Reading within the Alberta Teachers' Association. Recognition from professional colleagues would enhance the possibilities for recognition from school administrators and fellow teachers.

Recommendations for Further Research

This research study focused exclusively on the experiences and perceptions of three teachers who sought and attained reading specializations. It chronicles the teachers' triumphs and disappointments from a single perspective. I believe it would be useful to follow-up with a further study of the perceptions of school and district administrators on the utilization of teacher expertise for the achievement of school and district educational goals. By studying two sides of the issue, it may be possible to find new opportunities to align the needs of administrators with the ambitions and personal professional goals of teachers so that both groups can achieve more satisfactory outcomes, and more importantly, so that children in schools can benefit to the greatest degree.

In the period of time since this research began, advancing technology, such as internet delivered programs, has expanded teachers', access opportunities for graduate studies in reading instruction for teachers, especially for those living

at a geographical distance from traditional university programs.  With the reduction of one of the barriers to advanced study in reading, what is the interest and participation in these new technology-mediated graduate programs?  With more classroom teachers with advanced study in teaching reading in classrooms, what are these teachers' expectations about their teaching careers, particularly as related to literacy and reading instruction?  How is reading instruction in classrooms and schools being affected by more expert teachers?  Is there a recognition and acknowledgement by administrators of a more knowledgeable teaching cadre?

Much of the available literature on teacher leadership is a reflection of schooling in the United States of America.  In Canada, the school system demonstrates a far greater faith in public education and experiences much less interference from political ideologies, making it difficult to align the American based research to Canadian contexts. Researchers such as Hargreaves (2006) and Fullan (2000) share some examples from Canadian experiences, but these represent a limited literature base if Canadian educational realities are to be understood.  Studies on the topic of educational/teacher leadership in Canadian schools need to be more widely undertaken and the results made available to administrators and instructional leaders.

Conclusion

In the Afterword of his book *What Really Matters for Struggling Readers*, Allington (2006) emphasizes the complexity of reading, and how important it is to have highly qualified and knowledgeable teachers to help children learn. Quoting an article he wrote for the Phi Delta Kappan journal, he says, "'In the end, it will become clearer that there are no 'proven programs,' just schools in which we find more expert teachers ....' (Allington, 2002c, p. 747)" (as cited in Allington, 2006, p.185). This quote sums up what I believe to be true about reading instruction in all schools. I began thinking about this research when I witnessed teachers plodding through reading 'programs' with little understanding about how their instruction should fit into a comprehensive literacy program, and who were often confounded by those learners who just couldn't catch on to reading. I also knew that I was able to bring meaning to these 'programs' because, as a result of the graduate studies I had pursued, I knew more about how reading takes place. It seemed logical to me that if those with more understanding about reading could provide support for those who had less of an idea, it couldn't help but improve instruction for children. I believe that Sadie, Bernard and Artie had the knowledge and will to provide the leadership for those less informed teachers and in a small way were able to make some lasting changes in some classrooms and schools. However, I cannot dispel the idea that their's was a promise unfulfilled. Their work touched many teachers, some of whom embraced the ideas whole-heartedly, and some who recognized the merit but needed more time to work on their own learning. However, without the opportunity to further nurture the

change Sadie, Bernard and Artie were able to bring, it is questionable if the change was lasting, or simply yet another 'program' that passed through classrooms.

For me, the biggest disappointment in the findings of this study was the apparent undervaluing of teacher knowledge as demonstrated by the lack of recognition experienced by all three of the participants. The conclusion I draw is that many educational administrators have not embraced the idea that the best performance from students comes from classrooms with the best educated teachers, and that there is no 'magic program' that will provide the achievement results that seem to be the driving force of current policy and administrative decision-making.

There are many teachers like Sadie, Bernard and Artie, who feel a burning need to know more about teaching reading. Given the new opportunities for access to graduate studies, more teachers will hopefully take the initiative to advance their understanding and provide instructional leadership through professional learning communities in their own schools. The result may be the kind of change Artie, Sadie and Bernard were hoping to implement. I thank Sadie, Artie and Bernard for sharing their stories and I hope that by passing these stories on we can come to a better understanding of the roles and needs of teacher leaders.

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