

FOCUS ON EXCEPTIONAL CHILDREN

Balanced Literacy Instruction

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A few years ago, Pressley (1998) wrote a book about elementary-level literacy instruction, *Reading Instruction That Works: The Case for Balanced Teaching*. A main message in that book is that excellent elementary literacy instruction balances skills instruction (e.g., phonics, comprehension strategies teaching) and holistic literacy opportunities (reading of authentic literature, composing in response to text). In making that case, Pressley reviewed substantial evidence validating the positive impacts on literacy achievement of many elements of elementary literacy instruction. He also reviewed evidence that beginning literacy classrooms in which achievement is high are typified by balanced teaching.

The message was strong and clear that the two warring camps in elementary literacy were both wrong. The available evidence favors neither those promoting predominantly skills-focused literacy teaching nor those favoring environments filled with holistic experiences to the exclusion of skills instruction (e.g., whole language).

The term "balance" has definitely caught on. As is often the case, however, many began to wrap themselves in the term without regard to whether their position was consistent with Pressley's (1998) intention in *Reading Instruction That Works*. Thus, in the past several years, many other books have used the phrase "balanced instruction" or some variation of this phrase. Some of these recent books suggest heavy doses of skills, with many pages devoted to conceptualizing, describing, and defending skills instruction while mentioning holistic opportunities only in passing. Others devote many pages to conceptualizing, describing, and defending holistic teaching, and recommend skills instruction as something that can be done in the context of holistic reading and writing and only when the need arises.

We should have anticipated imbalanced conceptions of balanced teaching. Before Pressley wrote the book on balanced literacy instruction, he edited one with Ellen McIntyre (McIntyre & Pressley, 1996). That text offered a variety of conceptions of balance, from conceptions more heavily favoring skills teaching to those clearly in the whole language camp. That somewhat confusing mishmash of conceptions, in fact, motivated the emphasis in Pressley's subsequent book that balanced instruction really means a lot of skills instruction in the context of massive holistic teaching!

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Since his 1998 book, nothing has happened to persuade Pressley that he erred in favoring balanced instruction as conceived in that volume, despite the dual perspectives—those of some skills enthusiasts who believe that balanced instruction is simply whole language in thin disguise and some whole language theorists who view balanced instruction as skills instruction warmed over. As critics took aim, Pressley and his colleagues just kept studying effective and ineffective elementary instruction. Whenever they have found an elementary classroom in which literacy engagement was high, they found balanced teaching as conceived in the 1998 book, as well as evidence that literacy development was on course.

In this article, we review the evidence for balanced literacy instruction in the elementary years, focusing especially on recent developments that increase confidence in the 1998 conception. In doing so, we specifically make the case that the balanced instructional model is particularly appropriate and beneficial for students who have initial difficulties in learning to read and write. What will become apparent by the end of the article is that balanced instruction requires knowledge of how to carry out effective skills instruction as

well as high awareness of how to teach holistic reading and writing. Balanced classrooms reveal both forms of instruction, teaching that is both complicated and coherent, as well as tailored to the needs of individual students.

BALANCING MANY ELEMENTS OF INSTRUCTION

A central claim made here is that excellent literacy instruction is balanced with respect to skills and holistic components. The following discussion explains how we know this to be the case.

Survey of Nominated-Effective Primary Teachers

Pressley, Rankin, and Yokoi (1996) surveyed well-respected primary-grade teachers about their literacy instruction practices. The first challenge was to identify a sample of teachers. To do so, Pressley et al. wrote to 50 reading supervisors across the nation and asked each of them to nominate one kindergarten, one grade-1, and one grade-2 teacher in their district as effective in educating their students to become readers and writers. In general, the supervisors nominated teachers whom they had observed directly and who had excellent reputations with administrators, other teachers, and/or parents as being effective in stimulating literacy development.

In the first phase of the investigation, each nominated teacher was asked to list 10 instructional practices essential to his or her literacy instruction. Teachers who responded in the first phase mentioned more than 300 different practices. In the second phase of the study, the teachers responded to a more focused questionnaire, which posed one question for each of the 300 practices cited in the first phase of the study, to determine the prevalence of the various practices.

The overarching finding in the study was that these primary-grade teachers did many different things to support and encourage the literacy development of their students. The teachers in this study reported being extremely eclectic in their literacy instruction. Yes, this group favored whole-language principles, with 97% reporting that their instruction reflects at least somewhat the tenets of whole-language instruction. Yet they also reported offering frequent skills instruction, both in the context of actual reading and writing and in lessons in which the skills were isolated and presented in a decontextualized situation.

Their responses did not seem to be consistent with any of the more extreme perspectives that have been offered in the literacy debates of the 20th century. They certainly did not advocate skills-first instruction, nor did their responses reveal anything consistent with a whole-word approach. Their version of whole language was tempered by much attention to skills instruction, although the more committed

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the teacher was to whole language, the less skills instruction he or she reported.

These teachers were committed to balancing a number of components, some more consistent with whole language and some more consistent with skills instruction. Although a number of primary-level researchers (e.g., Adams, 1990; Cazden, 1992; Delpit, 1986; Duffy, 1991; Fisher & Hiebert, 1990; McCaslin, 1989; Pressley, 1994; Stahl, McKenna, & Pagnucco, 1994) had advocated such balancing before this study appeared, Pressley, Rankin, and Yokoi (1996) fleshed out the balancing model. Their teacher reports raised the possibility that the balance model was extremely complicated. Based on Pressley, Rankin, and Yokoi (1996), effective curricular balancing is analogous to juggling hundreds of balls in the air. To further complicate this intricate juggling act, the precise balance of balls varies from child to child and situation to situation during the school day.

Followup on Literacy Development

One of the most interesting and surprising findings of the survey of nominated-effective primary-grades teachers was the teachers' reports about teaching struggling beginning readers. Basically, they said that instruction for struggling readers did not differ qualitatively from instruction for their other students. Yes, skills instruction was more extensive and intensive than with normally achieving students, but struggling readers also were immersed in literature and writing experiences.

This finding was intriguing enough to prompt Rankin-Erickson and Pressley (2000) to follow it up. Specifically, the follow-up research surveyed primary-level teachers who are especially concerned with struggling readers—that is, primary-level special education teachers whom their administrators considered to be highly effective in stimulating literacy development. The methodology in the study was similar to the methodology in the Pressley et al. (1996) investigation, with an open-ended question (What are the essential elements in your literacy instruction?) followed by a detailed questionnaire asking teachers about each of the instructional practices they mentioned in their open-ended responses.

Just as was the case with the survey of nominated-effective primary-level teachers, the nominated-effective, primary-level special educators mentioned hundreds of specific elements of instruction in their responses to the open-ended question. The second questionnaire tapped 436 instructional practices, as had been the case in the Pressley, Rankin, and Yokoi (1996) study.

The most interesting, overarching conclusion of the study was that the instruction reported by the nominated-effective, primary-level special educators was not much different from the instruction reported by the nominated-effective first-grade

teachers. They described a great deal of skills instruction in their lessons, but they also reported extensive literature and writing experiences. In general, the explicitness and completeness of skills instruction was reported as increasing with the severity of the students' difficulties in learning to read.

Although some skills instruction was portrayed as decontextualized, most skills instruction was reported to occur in the context of real reading and writing. These teachers were emphatic in stating that whole language and skills instruction are not contradictory but, rather, complementary approaches in their instruction of struggling beginning readers. The teachers reported providing education to students in special education that was not much different from the instruction they provided to other students. The special education students did receive more intensive sound-, letter-, and word-level skills instruction, but they also received the rich mix of literacy experiences that excellent primary-grades general education teachers reported providing to average and above-average students.

Observations of Outstanding Teachers

Pressley and his associates followed up the surveys with observational studies of some outstanding primary-level teachers—in particular, outstanding grade-1 teachers. The observations of classrooms were complemented by interviews. The data were analyzed using a method known as *constant comparison* (Strauss & Corbin, 1990). The initial result was a detailed summary of the elements of instruction for each classroom in the study and how those elements were related to one another. Then the results for individual classroom were analyzed to generate more general conclusions across classrooms.

Upstate New York Study

In the first such study (Wharton-McDonald, Pressley, & Hampston, 1998), administrators and reading specialists in a number of upstate New York school districts were asked to nominate a first-grade teacher in their district whose teaching was considered exemplary in promoting literacy, and another teacher in the district who was considered more typical of the district's grade-1 teachers. When the study began, the sample consisted of 10 teachers, 5 of whom were nominated as outstanding in promoting their students' literacy and 5 of whom were nominated as more typical.

Several observers made multiple visits to the 10 first-grade classrooms. The visits to a classroom continued until the observers were confident that they were coming to no new insights about what was going on in the classroom. The teacher interviews were driven by the observations. That is, questions were designed to clarify what the observers had

seen during the classroom visits, and each interview was tailored to what they had seen in each teacher's own classroom.

As part of the observations, the researchers explicitly looked for indicators of literacy achievement in classrooms, because the researchers did not want to accept the school district's appraisals of teachers as exemplary or more typical without any corroboration. Three indications of achievement characterized classrooms with high literacy achievement compared to those with less achievement:

1. By the end of the study, reading achievement clearly was better in some classrooms than others. That is, in some classrooms most students were reading books at or above grade level by the end of first grade, whereas in other classrooms many students were reading books well below grade level.
2. By the end of the year, writing was more advanced in some classrooms than in other classrooms. In some classrooms most students were writing longer than one-page stories that were reasonably coherent. In these same classrooms, the students' punctuation, capitalization, and spelling were often quite good. In contrast, in the classrooms taught by more typical teachers, the stories were much shorter on average (e.g., perhaps two or three lines long) with less evidence that students understood and correctly used punctuation, capitalization, and spelling conventions.
3. In some classrooms student engagement was much more consistent than in other classrooms (i.e., in some classrooms, more of the students engaged in productive reading, writing, or other academic activity more of the time than in other classrooms). Most striking, classrooms with high reading achievement also showed high writing achievement. Moreover, in the classes with high reading and writing achievement, most students seemed to be working productively on literacy tasks most of the time.

During the course of the study, one teacher dropped out because of personal reasons unrelated to the study, leaving a total of 9 teachers who were observed and interviewed over the course of the year. Of these nine, three stood out in promoting reading achievement, writing achievement, and engagement. (Two of these originally were nominated as outstanding teachers, and one was originally nominated as more typical of his district.) Three teachers stood out as not being as successful as the others in getting their children to read and write and be engaged in literacy activities. Three were in the middle with respect to success in promoting their students' literacy and engagement.

In addition to differences in achievement, some striking differences became apparent in the teaching in classrooms

with high achievement on average, especially relative to the classrooms with low achievement on average. In the three classes in which reading and writing achievement seemed especially positive, the students seemed most motivated to achieve, with high engagement in these classes. Students in these classes were reading and writing all the time:

Put simply, literacy was part of virtually everything that went on in the top three classrooms. When we asked one teacher to estimate what percentage of her students' day was spent actively reading, she replied:

I would say everything we do in here...is so integrated that, to do any activity in here, they need to read something. So I would say for everything we do in here, there is a reading portion. So most of the day...they are immersed in that text! So—well, you just find ways to incorporate it. It *can't* separate. You can't be driving along and say, "Oh, I've got to read that sign. So I'd better stop, read the sign, and then go on." It's just there. It's part of your day. And that's how it is in here, too. (Wharton-McDonald et al., 1998, p. 119)

In fact, in these classes, 90% of the time when observers looked around and estimated the percentage of students who were on task, 90% of the students were on task. The high-achieving classrooms were busy classrooms, abuzz with reading and writing activity.

Although all nine teachers combined skills instruction with reading literature and writing, the teachers with the highest achieving students seemed to integrate the skills instruction with the holistic activities better than did the teachers whose students had lower levels of achievement. During the interviews the teachers with high-achieving students were emphatic that neither an exclusive skills orientation nor an exclusive whole-language approach would fit their students well. According to one of the three teachers with the highest achievement, teaching beginning reading is

a fine balance between immersing the child in whole language and teaching through...sounds, going back to using skills. . . . If you don't have a balance, it's kind of like trying to fit a square through a circle. It doesn't work. You don't connect with everyone if you don't use a variety of [teaching] strategies. (Wharton-McDonald et al., 1998, p. 114)

Given the predominance of the whole-language model in upstate New York, we were struck at how open these teachers were about their skills instruction, with two of the three even using basal materials to develop phonics skills in students. In contrast, a teacher in the low-achieving group explained the purpose of her reading groups in this way:

Well, basically, when we read out of the basal books, it's pretty much reading the next story, whatever that may be, and then there are some. . . . workbook pages. . . . The workbook page itself is an assessment of what they read—and how they follow, even down the page. . . . But just orally listening to them read; watching them to see if they're paying

attention, following along while others read. You know, you can tell so much just in that short time—how they're coming along." (Wharton-McDonald et al., 1998, p. 116)

What was also striking during every visit to the three most balanced classrooms was the number of skill-oriented mini-lessons. These teachers seemed to monitor their students carefully to detect which ones needed a mini-lesson and when they needed it (e.g., a mini-lesson on the sound "h" makes as a student struggled to spell the word "heart"). Despite the frequency of mini-lessons, these classes never seemed like skills-driven classrooms, because the students were immersed in reading excellent children's trade books and in writing real stories and essays.

In contrast to the teachers of students with the highest achievement, the other teachers who were observed did not integrate skills instruction and holistic experiences nearly as well. Rather, classrooms seemed to have times set aside for skills teaching and times set aside for reading and writing. For example, in observing classes with lower achievement, the spelling lessons had no later connection to spelling during writing (invented spellings in compositions were accepted, even for words covered in spelling lessons). The connection between skills learning and application in the highest achieving classrooms was not as apparent in the other classrooms observed in this investigation.

Classrooms with the highest achievement always had a great deal going on—in particular, a lot of instruction. Even mundane events, such as filling a stapler, were transformed into lessons in the classrooms with the highest achievement (e.g., the teacher asked students to name the color of the stapler—which was silver, a new vocabulary word for them). In the higher-achieving classrooms, classroom routines, such as dismissal, were transformed into instruction (e.g., by requiring students to spell words to get into the dismissal line). In contrast, instruction was not nearly as much an every-minute thing in first-grade classes with lower achievement. Many more lessons in the higher-achieving classes involved scaffolding; the teacher provided just enough support so the student could begin to make progress on a task but not so much as to be doing the task for the student.

Scaffolding required that the teacher monitor students carefully and consistently. It also required that the teacher thoroughly understood the tasks students were attempting (e.g., having a complete knowledge of phonics to be able to scaffold students' sounding out words). Scaffolding was everywhere in the high achieving classrooms and much more prominent in the higher-achieving than the lower-achieving classes.

In the higher-achieving classrooms students were strongly encouraged to do things on their own as much as possible. As children were taught word attack, spelling, and comprehension strategies, they also were taught to use the strategies

whenever they were appropriate. When students did self-regulate, teachers with high-achieving classes often noted the self-regulation and reinforced it. Thus, after a boy named Kevin self-corrected himself during reading, his teacher remarked, "When Kevin made a mistake, what did he do? . . . Yes, he went back over it. It's okay to make mistakes." Teachers with high-achieving students consistently encouraged students to self-monitor how well they were doing and to make corrections as necessary.

The higher-achieving classrooms revealed a thorough integration of reading and writing. Consistently, students were asked to respond to what they read by writing. Also, students in the high-achieving classes did a great deal of reading of their own writing, especially their rough drafts, as part of revising. Often, writing assignments required research, so students had to find materials in the library and other places and then read them. Then the students wrote about the topic by incorporating ideas from the materials they found in the library. Projects such as this permitted an integration of reading, writing, and content learning. These crosscurricular connections were prominent in the high-achieving classrooms.

The teachers with high-achieving classes had high expectations that their students could learn and that they could be readers and writers. The effective teachers communicated a "can-do" attitude to their students. Discipline was not a problem in classrooms characterized by high achievement. These teachers had a set of routines for the tasks that were repeated every day, with morning meetings, movement to special classes, and dismissals all taking place efficiently. Clearly, in these classrooms much planning had occurred in advance of the school day, but at the same time these teachers seemed to be able to accommodate flexibly the moment-by-moment needs of their students, many of which were unpredictable (e.g., providing mini-lessons to small groups of students when a need became apparent).

In summary, the strong classrooms in the Wharton-McDonald et al. (1998) study evidenced a balancing of a number of instructional components. Of particular relevance, all the students in the very best classrooms were integrated well into the balanced instruction, with every student receiving both skills instruction and holistic experiences at his or her competency level.

National Study of Grade-1 Teachers

After Wharton-McDonald et al., Pressley et al. (2001; see also Pressley, Allington, Wharton-McDonald, Block, & Morrow, 2001) studied a national sample of grade-1 teachers. Again, some teachers were outstanding in promoting achievement of their students and others were less effective. As in Wharton-McDonald et al. (1998), the balancing of

skills teaching and holistic instruction was more certain in the strong classrooms than the weaker classrooms.

Also consistent with the Wharton-McDonald et al. (1998) study, much instruction was going on—of letter- and sound-level skills, word recognition skills, vocabulary, comprehension strategies, and writing strategies. And the students were reading excellent literature, literature that expands children's knowledge and understanding of the world. Every child in these classrooms was immersed in this rich multicomponent instructional world, a world in which every child received a balance of skills instruction and holistic experiences appropriate for him or her.

Motivation Studies

Most recently, Pressley and his colleagues had noted that the effective teachers they studied engaged their students in literacy instruction. They did much to motivate students to read and write. Thus, Bogner, Raphael, and Pressley (in press) decided to focus a study of grade-1 literacy instruction on motivation. They observed 7 grade-1 classrooms for a year. Two of these classrooms were distinguished in that their students were much more engaged in reading and writing than in the other classrooms. The engagement was not accidental, however, for the engaging teachers, compared to the other five teachers, did much to motivate their students. In fact, the two most engaging teachers each used more than 40 different mechanisms to motivate their students to do things literate (Raphael, Bogner, Pressley, Shell, & Masters, 2001), including the following:

- encouraging cooperative learning
- downplaying competition
- holding students accountable for their performances
- projecting high expectations
- scaffolding student learning
- making library and crosscurricular connections to content covered in class
- encouraging autonomy and choice
- having a gentle, caring manner
- interacting with students positively, making home-school connections
- providing opportunistic mini-lessons
- reteaching when students failed to understand the first time
- making personal connections with students
- supporting appropriate risk-taking
- making the classroom fun
- encouraging creative and independent thinking by students.

The classrooms of the two really engaging teachers were distinguished by interesting content and tasks, appropriately challenging material, and depth of coverage. The really

engaging teachers also presented abstract content personally and concretely, had clear learning objectives, used effective praise and feedback, modeled thinking and problem-solving skills, encouraged stick-with-it-ness, and explained the relevance of what was being taught. The engaging teachers encouraged their students to believe they could achieve their goals with effort. Their classroom management was superb, so good that disciplinary events rarely occurred and were hardly noticeable when they did. The engaging teachers always knew what every member of the class was doing and intervened when students seemed puzzled or were not making progress.

One of the exemplary teachers from the nationwide study of effective first-grade literacy instruction (Pressley, Wharton-McDonald, et al., 2001) came from a district that implemented the Reading Recovery program. Reading Recovery is an early intervention program used typically with first-grade students who are making slow progress in learning to read in the general classroom (Lyons, Pinnell, & DeFord, 1993). Students are taken out of the classroom for a half hour daily for the one-to-one tutoring that is Reading Recovery.

These sessions follow a structured format, balancing phonics with strategy instruction during scaffolded reading and writing. The tutoring can continue for as long as a semester. The exemplary teacher, who had been trained as a Reading Recovery tutor, was incorporating into her classroom teaching many of the instructional practices and strategies of Reading Recovery.

That this one teacher incorporated so much of Reading Recovery into classroom instruction prompted Roehrig, Pressley, and Sloup (2001) to explore how other teachers in the same district were transferring into their classrooms what they had learned as Reading Recovery tutors. Ten primary-level teachers were observed over the course of two years. Again, the method of constant comparison was used (Strauss & Corbin, 1990) in the iterative process of data collection and analysis. Teachers with more training and experience in Reading Recovery were more likely to use the instructional practices and teach the strategies emphasized in Reading Recovery in their general classroom instruction, and their instruction seemed more like the instruction of exemplary teachers in the earlier studies (Roehrig et al., in press). In particular, the literacy instruction of these teachers was a complex balance of direct instruction, often in the form of mini-lessons and in the context of authentic reading and writing activities, with the teachers being particularly sensitive to the competencies of each student and the scaffolding necessary for development of self-regulation.

As this article is being published, Sara Dolezal, Lindsey Mohan, Melissa Vincent, and Michael Pressley are carrying out a similar analysis at the grade-3 level. The preliminary

results are similar: The minority of grade-3 teachers are really engaging, and the engaging teachers are doing much to motivate their students relative to the less engaging teachers.

The Pressley group has generated a great deal of research establishing that excellent elementary instruction entails a complex balancing of a number of components including both skills-based and holistic tasks. Also, much goes on to encourage students' will to learn, to encourage their engagement in literacy-development tasks, especially real reading and writing.

WELL VALIDATED COMPONENTS OF BALANCED ELEMENTARY LITERACY INSTRUCTION

If the results described in the last section have not been received positively by those who are strongly committed to skills instruction or whole language, they have been received enthusiastically by many others who recognize that effective instruction must include multiple components. Even so, for the most part, literacy researchers have concerned themselves with particular elements of instruction as they have carried out research on effective practice. This is consistent with the true experiment being a high ideal for establishing a cause-and-effect relationship between an instructional practice and an educational outcome (National Reading Panel, 2000).

True experiments lend themselves well to evaluating individual components of instruction. In fact, the many true experiments and quasi-experiments focusing on reading instruction have provided a great deal of information about components that can be added to instruction with benefit. (Quasi-experiments involve comparisons between instructed and noninstructed students when assigning students randomly to the instructional condition was not possible; the hallmark of the true experiment is random assignment to conditions). Readers should note especially that every one of the well validated components detailed in this section was detected in the effective classrooms that were the focus of research summarized in the foregoing section.

Most of the work reviewed in this section also is particularly pertinent in the context of a discussion of students with learning difficulties, for many of the single-component interventions have been aimed at specific problems that some children experience as they learn to read. Struggling young readers certainly have been studied much more extensively with respect to single-component reading interventions than have average or above-average young readers.

Phonemic Awareness and the Alphabetic Principle

Phonemic awareness is a special type of metacognitive awareness. It is awareness that words are composed of separable sounds that are blended together. The *alphabetic*

principle is the awareness that sounds are represented in words by the letters of the alphabet. These fundamental awarenesses are critical for the beginning reader. Without awareness that letters map sounds that can be blended together, there would be little incentive for paying attention to the individual letters of words, and lessons about individual letter sounds would make little sense.

Phonemic awareness, in particular, has received a great deal of attention, largely because of demonstrations that low phonemic awareness in the early grades predicts reading problems in the middle grades (e.g., Bowey, 1995; Juel, 1988; Näslund & Schneider, 1996; Stuart & Masterson, 1992). More positively, however, phonemic awareness can be developed through instruction, and when it is, subsequent reading difficulties are reduced (e.g., Bradley & Bryant, 1983, 1985, 1991; Byrne & Fielding-Barnsley, 1991, 1993, 1995; Lundberg, Frost, & Peterson, 1988; Lie, 1991; O'Connor, Jenkins, & Slocum, 1995; Vellutino & Scanlon, 1987; Williams, 1980; Wise & Olson, 1995). Instruction typically involves word games, such as detecting words that rhyme, pronouncing words when one sound is removed from another word (e.g., What does *mat* sound like if the *m* is removed? What does *mat* sound like if the *t* is removed?), and pronouncing words when a sound is added (e.g., What does *at* sound like if an *m* is added at the beginning? What does *ma* sound like if a *t* is added to the end?).

This instruction typically occurs over the course of months for a few minutes each day. It increases phonemic awareness in the short term and contributes to reading skill in the long term, which provides incentive for including such instruction in the early primary years (i.e., kindergarten and grade 1), especially to students who lack phonemic awareness upon entering kindergarten or grade 1.

In arguing for including phonemic awareness in literacy instruction, we are emphatic that phonemic awareness instruction is not a one-time quick fix. Development of phonemic awareness in kindergarten and grade 1 accounts for only a very small proportion of reading success in the middle elementary grades (Bus & van IJzendoorn, 1999). This warning is necessary because some policymakers seem to believe that instruction in phonemic awareness is a cure for preventing reading difficulties. In fact, it is only one ingredient in the cure, with the best medicine being a balanced reading instructional program involving skills instruction and holistic opportunities.

Particularly relevant in a discussion of balanced reading instruction are demonstrations of the effectiveness of phonemic awareness in programs that are otherwise whole language in outlook. The best known—and a well-designed—study was offered by Castle, Riach, and Nicholson (1994). Participants in the study were all enrolled in a whole language kindergarten. Students receiving phonemic

awareness instruction participated in two 20-minute sessions a week, whereas control participants received instruction of skills not related to phonemic awareness. After 10 weeks of instruction, the phonemic awareness instruction improved the students' spelling skills as well as their sounding out of pseudowords. In general, inserting phonemic awareness into ongoing beginning literacy instructional environments has yielded positive effects on early reading skills (e.g., Blachman, Ball, Black, & Tangel, 1994; Byrne & Fielding-Barnsley, 1991, 1993, 1995).

Word Recognition Instruction

"*The great debate*" (Chall, 1967/1983) in beginning reading largely has been about what type of word recognition instruction works best with beginning readers. Chall's answer, based on the research available up until the middle 1960s, was that synthetic phonics instruction produced better readers than the whole word approach predominant in schools in those days. *Synthetic phonics* involves teaching students to map letters in words to their sounds and to pronounce the word by blending the sounds (i.e., sounding out the word). In contrast, the whole word approach involves learning words as wholes. After a number of whole words were known to readers as sight words, readers could be taught to analyze the sight words into their component sounds.

The whole word approach was used most prominently in the Dick-and-Jane readers published by Scott, Foreman, and Company. An especially important finding in the Chall analyses was that synthetic phonics seemed to be especially beneficial for weaker students.

Since the time of Chall's findings, a number of demonstrations have concurred that intensive synthetic phonics-type instruction can improve the word recognition skills of children who have difficulties with beginning reading (e.g., Alexander, Anderson, Heilman, Voeller, & Torgesen, 1991; Foorman, Francis, Fletcher, Schatschneider, & Mehta, 1998; Foorman, Francis, Novy, & Liberman, 1991; Lovett, Ransby, Hardwick, Johns, & Donaldson, 1989; Lovett et al., 1994; Manis, Custodio, & Szeszowski, 1993; Torgesen et al., 1996; Torgesen et al., 1999; Vellutino et al., 1996). Most children who have difficulties in initial word recognition problems can be helped by being taught how to sound out words using synthetic phonics.

Even so, synthetic phonics is not the only approach in the marketplace of word recognition interventions that seems to work with struggling beginning readers. People also can recognize new words by analogy to words they know already. They recognize *bat* because they already know *at*; they recognize *bar* because they already know *car*.

The best developed decoding-by-analogy program that I have encountered—the "Word ID" program (Gaskins,

Gaskins, Anderson, & Schommer, 1995; Gaskins, Gaskins, & Gaskins, 1991, 1992)—was developed by Irene Gaskins, Linnea Ehri, and Patricia Cunningham at Benchmark School, a school dedicated to the education of students who struggle to learn to read. At the heart of the program are 120 key words that capture the key spelling patterns associated with the six English-language vowels. In addition, there are key words for the two sounds of *g* (e.g., girl, giraffe) and the two sounds for *c* (e.g., can, city). Some word parts that always sound the same (e.g., -tion) are taught as wholes.

For example, to decode the word *dispatcher*, the word-ID user would learn to identify a keyword for each syllable of the word. For the first syllable, *dis-*, the keyword *this* could be used, as the vowel *i* is followed by a consonant. For the second syllable, *-patch-*, the keyword could be *cat*, as the *a* in *-patch-* is followed by a consonant. For the final syllable, *-er*, *her* would apply. Thus, the student would know the sequence of vowel sounds in the word. The student, who is also learning the simple consonant-sound associations of English plus the digraphs and consonant blends, would then be able to sound out the word, *dispatcher*.

The program extends over several years at Benchmark, with keyword learning and practice of the approach both requiring substantial instructional time. After several years of experience with the program, most Benchmark students can use the memorized key words with ease to decode multisyllable words they have not encountered previously.

The effects of word ID and synthetic phonics instruction are roughly comparable (DeWitz, 1993; Lovett et al., 1994) in developing the decoding skills of beginning readers. Lovett et al.'s study was especially notable because it involved teaching students who had a great deal of previous difficulties in learning to read—much like Benchmark students. In general, teaching children to decode by analogy to known words is effective in developing young readers who can decode words they have not seen before (e.g., Ehri & Robbins, 1992; Goswami, 2000; Peterson & Haines, 1992; van Daal, Reitsma, & van der Leu, 1994).

Word ID lessons do much more than teach children to decode. When key words are introduced, children also learn the meanings of the key words. The key words also are used as part of story writing. The lessons include reading of patterned books. Students hear and read good literature every day they are enrolled at Benchmark.

The Benchmark approach is anything but a decoding-only approach. Rather, word-ID is embedded in a full literacy development program and is used to empower children so they can participate fully in reading real literature and writing. It is part of a balanced literacy program.

Although it is fine for a beginning reader to sound out words consciously or to use an analogy approach deliberately to

recognize words, older, skilled readers use neither of these tactics deliberately. Rather, good readers simply recognize words they have encountered previously without making synthetic-phonics or word-ID efforts. That they can do so almost effortlessly frees up their consciousness (working memory) to attend to other aspects of the reading tasks—to comprehend what they are reading. The human mind can do only so many things at once, and word recognition requires so much effort that little consciousness remains for comprehension of the words being read (Baron, 1977; LaBerge & Samuels, 1974), let alone their combined meanings in sentences, paragraphs, and whole texts.

Fortunately, with experience in recognizing words comes automatic, rapid, accurate, and less effortful reading of individual words (Horn & Manis, 1987). Balanced word recognition instruction teaches tactics for effortful decoding but also provides many opportunities for students to practice reading words until word recognition is automatic.

Vocabulary Teaching

Good readers have good vocabularies (Anderson & Freebody, 1991; Nagy, Anderson, & Herman, 1987). Moreover, reading comprehension improves when vocabulary words are taught explicitly. For example, Beck, Perfetti, and McKeown (1982) taught grade-4 children a corpus of 104 words over a 5-month period. The children who received the instruction outperformed non-instructed children on subsequent comprehension tests (see also Beck & McKeown, 1991; Durso & Coggins, 1991).

Children learn the meanings of many words by experiencing the words in the actual world and in text worlds (e.g. Dickinson & Smith, 1994; Elley, 1989; Morrow, Pressley, Smith, & Smith, 1997; Pelligrini, Galda, Perlmutter, & Jones, 1994; Robbins & Ehri, 1994; Rosenhouse, Feitelson, Kita, & Goldstein, 1997). That is, they encounter the vocabulary without any explicit instruction in the words and their meanings (Stanovich, 1986; Sternberg, 1987). Such incidental learning is filled with potential pitfalls, however. For example, often the vocabulary meanings that readers infer from context are wrong (Miller & Gildea, 1987). Explicit teaching of the meanings of important vocabulary makes sense, for, in its absence, young readers may have substantial misconceptions about what critical vocabulary mean.

Comprehension Strategies

Good readers are aware of why they are reading a text. They overview text before reading, make predictions about the upcoming text, read selectively based on overviews, associate ideas in text to what they already know, note whether their predictions and expectations about text content are being met, sometimes revise their thinking based on ideas in text, figure out the meanings of unfamiliar

vocabulary based on context clues, underline and reread, make notes and paraphrase, interpret, evaluate the quality of the text, review important points as they conclude reading, and think about how they might use ideas they encounter in the text (Pressley & Afflerbach, 1995).

Balanced reading instruction can develop these active reading skills in students. A main approach for doing so is through instruction in comprehension strategies. A number of individual strategies can be taught, including predicting, questioning during reading, seeking clarification when confused, constructing mental images representing ideas in text, and summarizing (Pearson & Dole, 1987; Pearson & Fielding, 1991; Pressley, Johnson, Symons, McGoldrick, & Kurita, 1989). Of course, good readers do not use strategies such as these one at a time. Hence, balanced reading instruction includes teaching students to articulate these various strategies as they read.

Effective comprehension strategies instruction begins with extensive teacher explanation and modeling of strategies, followed by teacher-scaffolded use of the strategies, culminating in student self-regulated use of the strategies (e.g., Anderson, 1992; Brown, Pressley, Van Meter, & Schuder, 1996; Duffy et al., 1987). When the instruction has been successful, it always has been long-term, occurring over a semester to a school year at a minimum. The benefits are consistent and striking (e.g., Collins, 1991), with several compelling demonstrations that such teaching dramatically improves the reading comprehension of weaker readers.

Thus, balanced reading instruction includes modeling and explaining of comprehension strategies and student practice of the strategies with teacher support. Excellent teachers of comprehension strategies let students know that they should continue to use strategies when reading on their own. The teaching takes place across every school day in a well-balanced elementary literacy program, continuing as long as required to get all readers to use the strategies independently. Typically, this means that excellent comprehension strategies instruction occurs over a few years.

Self-Monitoring

Balanced reading instruction teaches children to be aware when they are having difficulties with reading and to react constructively to problems during reading. That is, balanced reading instruction requires teaching students to self-monitor their reading. Good readers know when they need to exert more effort to make sense of a text. For example, they are aware when they have sounded out a word but the sounded-out word does not make sense in the context (Isakson & Miller, 1976). When good readers have that feeling, they try rereading the word in question. Teaching young readers to self-monitor their reading of words makes good sense because they often read the wrong word (e.g., “Little

Miss Muffett sat on her tupperware," Baker & Brown, 1984).

Balanced approaches to word recognition instruction incorporate a self-monitoring approach, in which readers are taught to pay attention to whether their decoding of words makes sense. When a word they read is not in synchrony with other ideas in the text and pictures accompanying the text (e.g., Iversen & Tunmer, 1993), balanced reading instruction emphasizes that students should try to decode it again (e.g., attempt carefully to sound it out).

Good readers also are aware when they are confused as they read; they self-monitor their comprehension (Baker & Brown, 1984). Teaching young readers to self-monitor and change their reading tactics when they are confused makes sense. Thus, balanced reading teachers teach their students to ask themselves, "Is what I am reading making sense?" They also teach students that initially confusing text often can be rendered sensible (e.g., by slowing down and reading more carefully, rereading confusing sections of text).

Extensive Reading

Many elementary classrooms have the banner "Read, Read, Read." It is good advice. Reading increases word recognition skills and the likelihood that beginning readers eventually will become fluent readers. Their vocabulary knowledge expands through reading. Reading high-quality books increases their world knowledge in general, which is critical, as well developed knowledge of the world facilitates comprehension in the future (Anderson & Pearson, 1984). For example, a child who has read a lot about Egypt will better understand an article about construction of the pyramids than will a reader who lacks prior knowledge about Egypt. In short, a balanced reading program should include extensive reading of good books, stories, and articles (e.g., Stanovich & Cunningham, 1993).

Despite the benefits of extensive reading, reading a great deal does not guarantee that a student will become an excellent reader. Many students actually get to college lacking the active comprehension skills of sophisticated readers (see Cordón & Day, 1996). That is why balanced reading programs include explicit teaching of comprehension strategies and self-monitoring, for these higher-order skills do not develop automatically from extensive reading, even if extensive reading does improve many word-level skills and increase factual knowledge.

Teaching Students to Relate Prior Knowledge While They Read

That extensive prior knowledge can increase comprehension does not mean that it always does so. Readers do not always relate their world knowledge to the content of a text,

even when they possess knowledge relevant to the information in the text. Often, they do not make inferences based on prior-knowledge unless the text demands the inferences to make sense of it (McKoon & Ratcliff, 1992).

That even good readers often fail to relate what they know to a reading, however, means that more is needed in many cases for readers to benefit from their prior knowledge. A large number of experiments conducted in the late 1980s into the 1990s demonstrated the power of "Why?" questions. Why-questions encourage readers to orient to their prior knowledge as they read, to relate what they know already to what is being read (Pressley, Wood, Woloshyn, Martin, King, & Menke, 1992).

In those studies, readers were encouraged to ask themselves "why" the facts being presented in text made sense. This encouragement consistently produced a huge effect on memory of the texts. The most compelling explanation that emerged from analytical experiments (see especially Martin & Pressley, 1991) was that the why-questioning oriented the readers to prior knowledge that could explain the facts being encountered in text. Thus, a Canadian person reading that baseball in Canada started in Ontario might not automatically infer that Ontario was close to New York, where baseball was first popular in America, even if the reader knew much about the early days of baseball in New York. If that same reader were to ask himself or herself why it would make sense that Ontarians were the first Canadians to play baseball, the early history of New York baseball might come to mind and permit the insight that geographical proximity was an important determinant.

Typically, when readers process text containing new factual information, they do not automatically relate the new information to their prior knowledge, even if they have a wealth of knowledge that could be related to the information. The lesson emerging from these studies is to encourage readers to relate what they know to information-rich texts they are reading, with a potent mechanism for doing this being why-questioning (referred to as *elaborative interrogation* by Pressley and his associates). In balanced reading programs, students are taught to relate to what they read, information they know already about a content area.

Process Writing Instruction

In balanced classrooms, students not only read, read, and read, but they also write, write, and write. One model of student writing is simply to let the kids write, and they will improve. The difficulty with this approach is that improvement is often slow, especially compared to approaches in which students are taught explicitly how to write using process writing instruction.

Process writing instruction fundamentally involves (a) teaching students to plan before they write, (b) construct

drafts, and (c) revise drafts with respect to meaning and mechanics (e.g., Flower & Hayes, 1980). Students can be taught a variety of specific strategies for each of these three steps, and specific students can be taught procedures for different types of writing (e.g., narratives, expositorys, book reports; Harris & Graham, 1996). Important in this context are the many validations of writing process instruction with students who otherwise experience difficulties expressing themselves in writing (see Harris & Graham, 1996).

Motivating Reading and Writing

Motivating students to read and write is important, especially for students who at first have difficulty in learning to read. These students often conclude that they lack the ability to become literate, and this attribution undermines their efforts to read and write (e.g., Jacobsen, Lowery, & DuCette, 1986; Pearl, 1982).

A huge educational motivational literature has accumulated in the past quarter of a century, with many mechanisms for encouraging student motivation identified by educational researchers interested in motivation. The relevant mechanisms include teaching students to believe they can be successful with effort (see Borkowski, Carr, Rellinger, & Pressley, 1990), providing many rich print and reading experiences (Gambrell, 1996; Morrow, 1992; Morrow & Sharkey, 1993; Palmer, Codling, & Gambrell, 1994), providing holistic literacy experiences (e.g., opportunities to compose stories; Turner, 1995), connecting literacy instruction with content-area learning (e.g. Guthrie, 1996; Guthrie et al., 1996), and encouraging cooperative learning rather than competition (Ames, 1984; Nicholls, 1989).

SUMMARY

Lots of individual educational interventions have been validated and deserve a place in a balanced literacy instruction program. Can we really fold into one classroom instruction in phonemic awareness, teaching of word recognition, vocabulary development, inculcation of comprehension strategies, prior knowledge development and instruction about how to use prior knowledge, and teaching of self-monitoring? Can extensive holistic reading and process writing occur in a classroom in which so many reading skills are being taught? As teachers mix skills instruction with holistic reading and writing, can they also employ the many motivational mechanisms that have been validated?

The answer comes from the research review in the first half of this article. Excellent literacy teachers do it all! They balance skills teaching and holistic experiences while flooding their classrooms with motivation. The case in favor of balanced literacy teaching is growing, a case that follows from balanced reflection on qualitative analyses of effective

classrooms and quantitative studies of specific components of instruction.

Plenty of work is left to be done. The research on balanced literacy instruction has focused mostly on the primary years, so much more research is needed in the upper elementary grades and the secondary years. We think the greatest challenge in the years ahead, however, is to find out whether more teachers can be developed who balance their literacy instruction in effective classrooms such as those described in this article.

We look forward to true experiments in which achievement is measured both in classrooms where teachers who previously were less balanced and more incomplete in their teaching have been taught to balance literacy instruction and in control classrooms in which instruction continues to be imbalanced and incomplete. If teaching teachers to be more balanced in fact changes the teachers' teaching and their students' achievement, it will provide powerful additional evidence in favor of the balanced literacy instructional model specified in Pressley's (1998) book.

Alysia Roehrig and Michael Pressley have begun research to explore whether beginning teachers can be transformed into more balanced and more effective teachers. A preliminary hypothesis emerging from this work is that only some teachers may be so open to such reeducation and modification of their teaching (see also Pressley & El-Dinary, 1997). If that turns out to be the case, maybe an important research question will be how to identify individuals who can become balanced and effective literacy teachers. How can teacher education programs be more selective about who is admitted to assure teachers who can and will do all that needs to be done to promote literacy engagement and achievement? Although much has been learned about balanced literacy instruction, much remains to be learned.

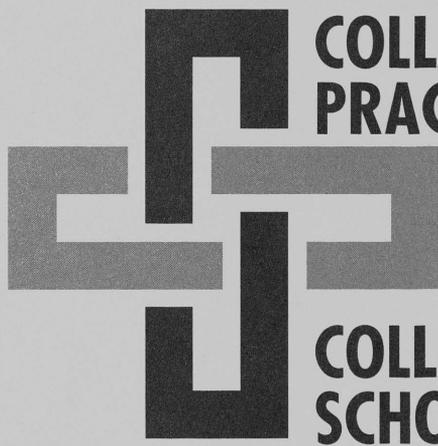
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