ABSTRACT

Title of Dissertation: HOW THREE EXPERT MIDDLE SCHOOL READING TEACHERS ENGENDER INTEREST IN READING

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Teachers are generally aware of the link between reading skills and academic achievement. They also recognize the connection between motivation and the learning of reading skills. What escapes many teachers, however, is knowing how to generate motivation for reading. The purpose of this qualitative multi-case study was to produce rich descriptions of expert reading instruction at the secondary level that could serve as models for literacy teachers wishing to improve their motivational skills.

The researcher's focus was on the motivational construct of interest as she sought to answer three questions: (a) How do three expert middle school reading teachers generate and sustain interest in reading? (b) What are these teachers' beliefs about the role of interest in motivating students to read? (c) What perceptions do these teachers have about the instructional discourses and practices that foster students' interest in reading?

The bounded system for this study was a set of three middle school teachers who taught the same subject to approximately the same age students, and who had acquired sufficient expertise to have earned the reputation of "expert teachers" from the principals and supervisors who recommended them as participants.

The researcher was an observer in the teachers' classrooms for two months at the end of the school year and two days the following September. All literacy instruction was video taped and teacher interviews were audio taped. Other data sources included field notes, research journal, instructional materials, and classroom displays.

The theme, interest as a worthy goal in itself, emerged from data analysis. It describes the teachers' belief that interest is a conduit to life-long learning and it explains their persistent focus on developing personal interest rather than situational interest. Data analysis also revealed the construct, "front-loading," which describes the participants' belief that in order to engender personal interest, teachers must first do the following: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

Future research should assess teachers' knowledge and cultural awareness about their students and how this affects their ability to engender student interest.

HOW THREE EXPERT MIDDLE SCHOOL READING TEACHERS ENGENDER INTEREST IN READING

By

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Dedication

To Joachim

And our Bettina, Antonia, and Max

Acknowledgements

During the years I spent working on this project, my confidence often waned, and twice I actually informed my advisor, Dr. Jean Dreher, that I was giving up. Fortunately, she refused to accept my quitting. It was because of Dr. Dreher's constant support that I persisted in my research and completed my dissertation, and I will always be grateful to her for her faith in me.

I was aware of the day-to-day toll my graduate work exacted on my family. I very much appreciated and often wondered at the patience and concern endlessly shown me by my husband and children. Their personal investment in my work assured its success.

For the inspiration that enlivened my ambition throughout this study, I thank my mother, always an example to me of self-improvement and life-long learning, and my sister, who I know would be very proud of me.

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Chapter I: Introduction

Statement of the Problem

In its October, 1998, *Bulletin*, the National Association of Secondary School Principals focused on what it called, "the crisis of adolescent literacy" (Irvin, 1998, p. 1). It pointed out that in the current public debate on how to improve reading in public schools, attention has been focused almost exclusively on young children. The general assumption has been that once children have learned to read in elementary school, they will have acquired the skills needed to use reading for the rest of their lives. Vacca and Alvermann (1998) challenged that assumption, stating, "The literacy learning that takes place in adolescents between the ages of 10 and 18 is of critical importance in preparing for life in and out of school" (p. 7). Optimal learning will not occur, however, if young people do not want to learn, especially if they lack motivation to read.

Several researchers have documented a prevailing decline in children's motivation for reading in the U.S. (e.g., McKenna, Kear, & Ellsworth,1995; Wigfield et al., 1997). In their national survey of children's attitudes toward reading, McKenna, Kear, and Ellsworth (1995) found a startling decline in children's positive attitudes towards reading from grade one to grade six. Although this occurred in all children regardless of sex, ethnicity, or reading ability, it was most pronounced in those of low reading ability. The results that McKenna et al. obtained from their large sample of 18,185 children clearly show the critical need for educators to address the problem of improving children's motivation to read.

Most teachers already are aware of this need. Yet, in spite of the fact that they identify student motivation as a major concern in their teaching (O'Flavahan, Gambrell,

Guthrie, Stahl, & Alvermann, 1992), many teachers know little about creating learning environments that foster motivation, in particular, motivation for reading (Pressley, Wharton-McDonald, Hampston, & Echevarria, 1998). This is a problem that can be addressed by showing teachers how their most accomplished colleagues succeed in motivating students. Many researchers have tried to do so, providing educators with statistical data on the characteristics of effective teachers, most often of elementary school reading teachers (e.g., Block, Oakar, & Hurt, 2002; Pressley, Rankin, & Yokoi, 1996). In my experience, however, teachers are reluctant to read research that requires a knowledge of statistics. What they need from reading research are detailed descriptions of classroom instruction focusing on important aspects of motivation, such as how expert teachers of adolescents create and sustain interest in reading.

Purpose of the Study

The purpose of my qualitative study was to produce rich descriptions of expert reading instruction at the secondary level that could serve as models for teachers wishing to improve their motivational skills. What follow are the results of a qualitative multi-case study that illustrates how three accomplished middle school teachers create and sustain interest in reading in their students.

Before going further, however, I would like to clarify the focus of my study by explaining my use of a few key terms that appear frequently in reading research literature regarding the concept, interest. As motivational constructs, these terms are closely related, however, I do not use them interchangeably:

Motivation is the most general term, concerned with goals and beliefs that move people to act. It is distinct from interest; for example, a student can be highly motivated to achieve in math class in order to maintain a high grade point average, although not be interested in math itself.

Intrinsic motivation is a desire to become involved in an activity for its own sake, like reading for pleasure (as opposed to extrinsic motivation which is doing an activity as a means to an end, like reading books to earn pizzas). The constructs of intrinsic motivation and interest are similar; however, "there is a major difference between a motive, which is an inner drive to action, and an interest, which is a fascination with something" (Bandura, 1986, p. 243).

Interest is a motivational construct that refers to an individual's preference for certain topics or domains (*personal interest*), or in its beginning stage, to a spontaneous reaction to stimuli in the environment (*situational interest*). Situational interest could be described as fascination; it is distinguished by the fact that it can develop into relatively enduring personal interest. Interest refers to "a person's interaction with a *specific* class of tasks, objects, events, or ideas, therefore, it is content specific. Such specificity distinguishes individual interest from other psychological concepts such as intrinsic motivation, attention, arousal, curiosity, and exploration" (Krapp, Hidi, & Renninger, 1992, p. 8).

Interest is most often confused with attention and curiosity. However, one can attend to something without being interested in it, as for example, when students carefully pay attention to a boring lecture in order to pass a test on the lecture material. Further, one can look at a book jacket and be curious about what happens in a story yet

not be moved (interested) to read it. Another example would be an instance in which a teacher might try to get the attention of a noisy group of students by making an even louder noise, perhaps by dropping a book. The students would be surprised, momentarily attentive and curious about what produced the sound. They would not, however, be described as fascinated by or interested in the teacher's action. Attention and curiosity can lead to interest and can be characteristics of an interested person, but they are not content specific nor do they persist long enough to become personal preferences.

Interest in reading can be situational when it is elicited by content-specific text characteristics, or personal when it is characterized by enjoyment of the very activity of reading. Some examples would be those individuals who read a great deal and always make sure to have a book in hand when they anticipate free moments in a day, or by those who request books as gifts at special occasions, or by those who often lose sense of time when reading.

As I describe the theoretical framework for my study in the following section and later in my literature review, I further discuss the differences between motivation, intrinsic motivation and interest and how interest differs from attention and curiosity.

Theoretical Framework

The historical roots of the concept of interest can be traced within the tradition of psychology back to Herbart (1806), James (1890), and Dewey (1913/1985). Dewey (1913/1985) spoke of "the vital juice of spontaneous interest" p. 154) as what results quite naturally when people identify themselves with their self-initiated activities. For

Dewey, interest developed within engaging activities and could flow into or from intrinsic motivation.

After Dewey, its most ardent promoter, the study of interest all but disappeared from the field of psychological research. Only since the 1970's has there been a renewed interest in interest, especially in how it affects learning. Research has shown that high interest is associated with more cognitive engagement and with learning at a deep level (Eccles, Wigfield, & Schiefele, 1998; Hidi, 1990; Renninger & Wozniak, 1985; Schiefele, 1974). Recently, educational psychologists have focused on how interest influences young people to select and persist in processing certain types of information in preference to others (Hidi & Harackiewicz, 2000); how interest serves as a contextual influence on subjective task values (Wigfield & Eccles, 2000); and how it affects the level of engagement and comprehension in reading tasks (Guthrie & Davis, 2003).

Within the extensive body of research on achievement motivation conducted during the past 30 years, the construct of interest has found a home among expectancy-values motivational theories. A basic assumption of expectancy-values theories is that "what behavior is undertaken depends on the perceived likelihood that the behavior will lead to the goal, and on the subjective value of that goal" (Graham & Weiner, 1996, p. 70). Students' subjective values include their appraisals of the importance of a task, or its usefulness, or its *interest* (Eccles et al., 1983; Wigfield & Guthrie, 1997). This study will focus on interest as one component of the subjective values that students have for undertaking various reading tasks.

As explained earlier, interest relates to the motivational construct, intrinsic motivation, which describes the engagement of an individual in a task because of

personal interest in the task itself. Hidi (2000) summarized the relationship between intrinsic motivation and interest in this way: "Whether one is referring to individual interest or to situational interest, the general class is intrinsic motivation, and one of the specific motives within that class is interest" (p. 317).

Schiefele (1991) concluded from his interest research that motivational orientations such as intrinsic motivation are general concepts that influence students' learning behavior across many subject areas; whereas interest is domain-specific. It explains why highly motivated students prefer particular school subjects or why they choose one challenging task over another. In investigating students' engagement in the domain of reading, Guthrie and Wigfield (1999) found that "reading motivation is the individual's personal goals, values, and beliefs with regard to the topics, process, and outcomes of reading" (p. 405).

Interest in reading could be viewed in a limited way as being associated only with lively texts or with interesting topics such as outer space or dinosaurs, however, my concept of interest in reading is broader. It refers to what Wigfield (1997) described as reading involvement, "…the enjoyment of experiencing different kinds of literary or informational texts" (p. 63). It is what motivates a student to pick up a book when other sources of entertainment are available.

Further, interest has been described as "an interactive relation between an individual and certain aspects of his or her environment" (Hidi & Harackiewicz, 2000); and as such, it can be viewed either as a stable individual preference for certain topics or domains, or as a spontaneous reaction to stimuli in the environment (Schiefele, 1991). It is this second form of interest, generally referred to as situational interest, that in the

hands of a skillful teacher can be a key to unlocking the motivations of adolescent students, especially those who generally are not motivated to read (Hidi & Harackiewicz, 2000).

Yet, teachers need to reach for higher goals than building into their curriculum topics and activities that interest students. Brophy (2004) advised teachers to "try to stimulate motivation to learn" (p. 18). In my study, the three participants did what Brophy suggested. In addition to introducing interesting topics, they aimed at engendering interest in reading itself "as an enduring disposition" (p. 18).

Rationale

Interest research confirms what I learned from my own experience as a middle school teacher--that interest is a powerful determinant of children's achievement. In Zahorik's (1996) questioning of 65 elementary and secondary teachers in his graduate education class, he found that they identified the generating of student interest as one of the most important elements of good teaching, and hands-on activities as the technique they most frequently used to create interest. Zahorik also learned from the teachers' written self-reports that, unfortunately, their hands-on activities were not always related to the instructional objectives of a lesson, and that these activities were used most often by teachers who had lesser degrees of content knowledge. This lack of connection between teachers' understandings about the concept of interest and their practical knowledge of effective ways to develop interest in their students highlights the need for models of effective instruction such as those that can be provided by qualitative studies that provide a vivid picture of effective classroom practices (Stipek, 1996). Dillon (1989)

emphasized that this need is particularly critical at the secondary level. She recommended ethnographic methods that provide in-depth knowledge about how effective secondary literacy teachers construct meaning together with their students.

Ruddell (1997) speculated that the reason there is only limited research available on the study of exceptional teachers is that the act of teaching relies heavily on the oral tradition and that the transitory and demanding nature of teaching inhibits in-depth analysis. In the past, educational researchers have generally used quantitative methods to study the behaviors and thought processes of teachers with extraordinary competence (e.g., Berliner, 1986), and the nature and effects of student interest (e.g., Schiefele, 1991). More recently, however, in studies of elementary teachers, researchers have moved from experiments in laboratory settings, or surveys and self-report studies to more in-depth naturalistic investigations (e.g., Pressley et al., 2001). I wish to extend this effort to the secondary school level, where there is need for the close scrutiny of teacher-student interactions that qualitative methods can provide.

Another reason for this study is that most research on expert teaching has consisted of comparisons of novice teachers to accomplished teachers (e.g., Berliner, 1986; Carter, Sabers, Cushing, Pinnegar, & Berliner, 1987). It has not dealt with the variety of ways in which pedagogical expertise can be practiced. Sternberg and Horvath (1995) and Smith and Strahan (2004) developed descriptive profiles on expert teachers that revealed “family resemblances” among them in spite of the fact that they taught differently from one another. My study applies a similar research orientation to the description of secondary reading instruction.

In studies of teacher performances, adjectives such as outstanding, exceptional, effective, excellent, exemplary, and expert seem to be used arbitrarily. Pressley et al. (1997) used the word *outstanding* six times, *effective* three times, *expert* twice, and *excellent* once in just the opening section of their study of effective fifth-grade teachers. It seems common practice in reading literature to use these terms interchangeably to describe the best educators. However, my choice of the term *expert* to describe my subjects is purposeful. I wish to use the theoretical frameworks of both expert theory research and motivation research to inform and guide my study of expert reading instruction. My contribution to the field of educational research will hopefully be to elaborate what has been learned through quantitative methods by providing a deeper understanding of how expert middle school reading teachers make sense of their professional worlds and how their beliefs about creating interest in reading influence their instructional practices.

Significance

In this era of high-stakes testing, many decisions that impact the lives of students and teachers are being made on the basis of student achievement on standardized tests, and clearly the most effective preparation that students can have for such testing is developing effective reading skills. Teachers are generally aware of the link between reading skills and academic achievement. They also recognize the connection between motivation and the learning of reading skills. What escapes many teachers, however, is knowing how to generate motivation for reading. I believe that encouraging teachers to

focus on interest building is one important way to address this lack of knowledge and to improve student achievement.

With interest so clearly shown to facilitate learning, it is important for educational researchers to investigate how teachers can best utilize interest building techniques to motivate their students. The detailed descriptions of expert teaching provided by my study will, hopefully, contribute knowledge to the field of reading research and increase teachers' understanding of how student interest waxes and wanes in the natural environment of the classroom. With this goal in mind, I framed the following research questions:

Research Questions

1. How do three expert middle school reading teachers generate and sustain interest in reading?
2. What are these teachers' beliefs about the role of interest in motivating students to read?
3. What perceptions do these teachers have about the instructional discourses and practices that foster students' interest in reading?

Definitions

I wish to clarify the meanings of the following terms which are used frequently in this study:

Engagement is the motivated use of learning strategies and knowledge within a learning community. It describes the intrinsic motivation that occurs during

learning activities.

Expert teachers. Leinhardt, Weidman, and Hammond (1987) defined expert teachers as those who have been identified by their principals and supervisors as producing unusual academic success in their students. Researchers who have studied the performance of outstanding teachers have found strong motivational skills to be part of their teaching repertoires (e.g., Pressley et al., 2001).

Although fellow teachers, parents, and students may have differing opinions about which teachers are the most accomplished, I believe that school administrators are most qualified to do so because they are in the position to gather feedback from each of those groups, and they are the only ones who regularly observe the classroom performance of teachers.

Interest is a form of intrinsic motivation that describes a person's response to particular aspects of his or her environment. It can be a temporary state (situational interest) or a lasting disposition towards specific content (individual interest). It is content specific and it has both cognitive and affective components. Interest research offers teachers a wide lens by which to view and understand interrelated aspects of student motivation. *Individual (personal) interest* is described by Schiefele (1991) as a relatively enduring preference for certain topics, subject areas, or activities. Students' preference for the activity of reading will be the focus of my investigation. *Situational interest* is an emotional state brought about by situational stimuli (Schiefele, 1991). It is not difficult for teachers to trigger situational interests in their students, for example, by

using hands on activities, choosing unusual topics, highlighting discrepancies in what students hold to be true, providing social interaction, or even offering food.

Literacy. The term literacy is used in this proposal in a broad sense to mean engagement in meaning construction using reading, writing, and oral discourse in the classroom environment (Ruddell, 1997).

Reading motivation encompasses more than interest in reading. It "…is the individual's personal goals, values, and beliefs with regard to the topics, process, and outcomes of reading" (Guthrie & Wigfield, 1999, p. 405). Interest is one type of value ascribed consciously or unconsciously by the individual to reading.

Basic Assumptions

A basic assumption in this investigation is that the meanings teachers develop regarding excellence in their field are gained through daily interactions with those around them (Bogdan & Biklen, 1992). I chose to do a collective qualitative multi-case study in order to explore these interactions in depth, carefully observing three teachers' instructional behaviors and questioning them about their beliefs regarding the place of interest-building in their teaching. My assumption in choosing a limited number of participants is that teachers' behaviors are not random or idiosyncratic, but rather they are translatable to other educators. I agree with those qualitative researchers who "…concern themselves not with the question of whether their findings are generalizable, but rather with the question of to which other settings and subjects they are generalizable" (Bogdan & Biklen, 1992, p. 33).

Another assumption, one consistent with expert theory (Chi, Glaser, & Farr, 1988; Ericsson & Smith, 1991), is that expert middle school reading teachers have acquired

over several years a privileged understanding of literacy instruction and have developed the ability to engender student interest in learning, specifically, in reading-to-learn. Huberman (1985) identified the skill of sustaining the interest of poorly motivated students as a characteristic of expert teachers and found that it takes no less than five years for teachers to develop this expertise. My pilot study suggested that this assumption is well-founded because the third-year teacher I studied, who was considered "expert" by her supervisors, was still nascent in developing personal goals and techniques for motivating adolescents (see Appendix A). Probably because of her limited experience, the teacher's beliefs about how to motivate students were not firmly developed and she often referred to how her colleagues motivated their students to explain why she did things her way.

Research Strategy

I chose a qualitative multi-case study methodology because it allowed me to closely examine teachers' beliefs and behaviors within the natural setting of their classroom environments. The bounded system I used was a set of three participants who taught the same subject to approximately the same age students, and who had acquired sufficient knowledge and expertise to have earned the recognition of "expert teachers" by their principals and supervisors. I focused on the teachers' professional lives, not on their other roles such as parents, spouses, citizens, etc.

For two months I observed in the teachers' classrooms, using multiple methods for gathering data on their beliefs and behaviors concerning interest building. I tried to assume a few, limited duties assisting the teachers in order to reduce the likelihood of

reactivity on the part of the teachers or their students (LeCompte & Preissle, 1993). My activities usually consisted of handing out materials or walking around the classrooms helping students who asked for assistance on their seatwork.

I anticipated at the outset of my field work that I would find commonalities in the participants' knowledge regarding the importance of interest in student learning and in their pedagogical knowledge regarding how to create and sustain interest within a daily lesson and a larger curriculum unit and, indeed, I did find that they shared common understandings. Yet, because the nature of teachers' professional lives is situational--it is continually influenced by many people and events--I also anticipated finding many differences in how their pedagogical knowledge translated into daily interactions with students. In fact, there were differences that seemed to be based on the teachers' personalities and number of years of experience.

The findings that emerged from my data revealed the following: the theme of interest as a worthy goal in itself, and the construct of "front-loading," which explained the belief shared by all participants that in order to engender personal interest, teachers must first do the following: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

Summary

The challenge of motivating students to read is faced by all teachers, especially secondary teachers. Unfortunately, many teachers know little about creating learning environments that foster motivation for reading. The purpose of my qualitative multi-

case study was to address this problem by providing rich descriptions of expert middle school reading instruction that could serve as models for teachers wishing to improve their pedagogical skills.

My research focus was on the motivational construct of interest as I sought to answer three questions: (a) How do three expert middle school reading teachers generate and sustain interest in reading? (b) What are these teachers' beliefs about the role of interest in motivating students to read? (c) What perceptions do these teachers have about the instructional discourses and practices that foster students' interest in reading?

I found that my three expert teachers shared similar convictions. One of their beliefs was that personal interest is a worthwhile goal in itself, not just a means toward instructional objectives. I also found that the expert teachers believed strongly in "front-loading" their interest building efforts, first, by establish a safe classroom environment for students, second, by building connections from the curriculum to students' lives, and third, by providing instructional scaffolding aimed at increasing students' sense of competency as readers.

In the following chapter, I review important literature in interest research and expertise research that provided the theoretical context for my study.

Chapter II: Literature Review

Abundant research has shown that teachers' beliefs and actions can have a powerful impact on student motivation and achievement (e.g., Bogner, Raphael, & Pressley, 2002; Stipek, 1996; Wentzel & Wigfield, 1998;). Within this extensive field of inquiry, my qualitative research study focused on the specific motivational construct of interest, interest in reading, and described how three expert teachers went about motivating their students to develop the budding interests they brought with them to the classroom and to develop entirely new interests. The questions guiding my research were (a) How do three expert middle school reading teachers generate and sustain interest in reading? (b) What are these teachers' beliefs about the role of interest in motivating students to read? and (c) What perceptions do these teachers have about the instructional discourses and practices that foster students' interest in reading? In exploring numerous data banks for extant research on my topic, I used these terms as my main descriptors: interest, student motivation, engagement, teacher expertise, teacher effectiveness, expert theory.

I wish to present in this literature review a theoretical context for my research questions and the parameters of my own interest in the application of interest research to reading instruction at the middle school level. I begin by reviewing how interest has been conceptualized during the past 30 years as an outgrowth of achievement motivation research, and how interest impacts students' academic performance. I then narrow my focus to research literature that sheds light on my research questions by showing what has been learned about the place of interest building within the pedagogical repertoire of classroom teachers and the beliefs that guide their instruction.

Next, the Pedagogical Expertise section of this literature review reports foundational research in the area of expert theory in general and the work of educational researchers who have built on expert theory in studying the effectiveness of outstanding classroom teachers. In both general expertise research and pedagogical expertise research the same trend over the past 25 years is apparent, namely, a movement from preoccupation with the cognitive skills of experts to a broader area of investigation that includes experts' intuitive, social, and political skills. *How* these skills are manifested by accomplished middle school literacy teachers forms the substance of this dissertation.

Interest Concept

In the context of academic motivation, the concept of interest is concerned with the all-important question of why students choose to engage in some learning tasks and not others; or why they are interested in some subjects but not others. Their purposes, or incentives, include the subjective values that students perceive learning to hold for themselves. For example, students may become actively involved in a task because skillful teachers have made it clear that the task is important or useful, or simply because the assigned task seems intrinsically interesting.

John Dewey (1913/1985) spoke of "the vital juice of spontaneous interest" (p. 154) as what results quite naturally when people identify themselves with their self-initiated activities. For Dewey, interest was integrally tied to the self and developed within engaging activities. Many years later, Deci (1992) reiterated Dewey's connection of interest to a person's self by defining interest as "...the core affect of the self" (p. 45). In the classroom, it is an affect that occurs in the interaction between a person and an

activity operating within a social context. "When people engage in activities within a social context that allows satisfaction of their fundamental psychological needs for competence, autonomy, and relatedness, they will be likely to maintain or develop enduring interests in those activities" (Deci, p. 52). In reviewing interest research in educational settings, Deci concluded that this person-activity-social context interaction fosters interest and eventually leads to optimal educational outcomes.

In considering the social context of today's public school classrooms, I would add the element of *safety* to Deci's list of fundamental psychological needs. The participants in my study strongly believed that students must feel personally safe in a classroom in order to develop personal interests in literacy activities.

Schiefele (1991) distinguished between two distinct types of interest, individual interest and situational interest. He defined individual interest as "...a relatively enduring preference for certain topics, subject areas, or activities," and situational interest as "...an emotional state brought about by situational stimuli" (p. 302). In his research with university students on text interest, Schiefele (1991) described two intrinsically motivating components within the specific area of individual interest, a feeling-related valence and a value-related valence. Individuals might feel great enjoyment and involvement when studying a particular topic or object, or they might value such an object or a subject matter because it has high personal meaning for them.

The university students who read high-interest texts in Schiefele's (1991) experiments became more engaged in reading and exhibited deeper levels of comprehension (even taking into account prior knowledge and ability) than did the students who read low-interest texts. Because interest provided this strong impetus

toward learning, Schiefele recommended that teachers develop not only content knowledge in their subject areas, but also knowledge pertaining to instruction and motivation that would help them develop their students' interest in the teachers' subject areas. My study aims to help teachers develop motivational expertise in the area of reading, which has relevance for all academic subjects.

Like Schiefele (1991), Pintrich and Schrauben (1992) conceptualized interest within an educational setting as "... a characteristic of the individual, but…activated at different levels depending on the situational features of the course or task" (p. 158). They differed with Schiefele, Krapp, and Winteler (1992), however, in explaining how interest relates to academic achievement. Referring to the correlational study of Pintrich and DeGroot (1990) concerning the motivations, self-regulation, and academic performance of 173 seventh-graders, Pintrich and Schrauben (1992) pointed out that students' perceptions of the value {interest} of a task do not have a direct influence on academic performance, but they do relate to students' *choice* of becoming cognitively engaged in a task or course. (The four regression analyses in the Pintrich and DeGroot study included cognitive strategy use or self-regulation.)

The apparent difference in conclusions drawn by Schiefele, Krapp, and Winteler (1992) and Pintrich and DeGroot (1990) regarding the effect of interest on achievement is likely explained by one of the persistent difficulties in interest-related research, the lack of common terminology. Pintrich and Schrauben, for example, used "interest" interchangeably with "task value," while Schiefele et al. (1992) spoke of enduring preferences and emotional states. A similar confusion in terminology is evident among teachers; *interest* often is used interchangeably with *attention* and *curiosity*. Perhaps this

is why some teachers, especially novice teachers, focus their motivational efforts on creating situational interest rather than personal interest.

Guthrie, Van Meter, Hancock, Alao, Anderson, and McCann (1998) would agree with Pintrich and Schrauben's interest to engagement to performance relationship. In their descriptive study of changes in literacy engagement among elementary students, Guthrie et al. concluded that increases in motivational and cognitive aspects of literacy are separate but interdependent. Text-based interest, for example, can evoke intrinsic motivation which leads to engagement in learning activities and results in increased conceptual understanding.

Guthrie et al. (1996) focused on reading engagement in their year-long training study on Concept-Oriented Reading Instruction (CORI) with low achieving third and fifth graders from lower income, culturally diverse schools. Following rich, hands-on activities on teacher-selected topics, the students personalized their learning by composing their own research questions. They then chose their own subtopics, found books that interested them, selected their own study partners, and developed their own goals for communicating to others what they learned. The CORI method manipulated real-world learning activities and self-directed learning to arouse students' curiosity, involvement and self-efficacy. Teachers showed students how to pursue their individual interests using effective learning strategies.

The CORI method had a significantly positive effect on the reading comprehension of the experimental subjects when compared to students who received traditionally organized instruction on the same topics. The most effective teachers,

therefore, would be those who provide instructional support while encouraging students to pursue their own interests through meaningful hands-on activities.

The three participating teachers in my study were aware of the impact of student choice on reading interest and offered their students many opportunities to frame their own learning. They were even more convinced about the importance of building students' reading competence by "frontloading" instruction in basic reading skills before literacy activities.

Wigfield et al. (1997) found that children's perception of themselves as competent learners related positively to their interest in learning as reported on yearly questionnaires. In a longitudinal study of 615 elementary students, Wigfield et al. discovered significant changes in competence beliefs and subjective task values over a three-year period; those beliefs and values declined from grades one through six. It is interesting to note that the downward trend in children's competence beliefs and beliefs about the usefulness and importance of various activities was consistent, but for interest it varied. Changes in children's interest fluctuated by domain, with the strongest decrease occurring for instrumental music and for reading. Math and sports had fewer pronounced decreases in interest. To differing degrees, students decided either that certain tasks were important and useful but not very interesting, or, vice versa, unimportant and useless but of high personal interest.

Pursuing the causal relationship between competence beliefs and interest, Wigfield and Eccles (2000) discovered through their research with elementary students that a directional causality was apparent over time, from competence-related beliefs to interest. Wigfield and Eccles suggested that teachers should focus initially on

competence beliefs when working with children with motivational problems. My participants' concept of "front-loading" instruction to eliminate barriers to reading describes their goal of building students' competency beliefs as a prelude to engendering interest in reading. One of the teachers, Ms. Marsh, expressed it this way: "I want my kids to enjoy reading because they know they can do it" (9/26/06 interview).

Another way of understanding interest is to make Kintsch's (1980) distinction between cognitive interest and emotional interest. He attributed the cognitive interest value of a text to how much the reader knows about the subject, the uncertainty a text generates in the reader, and the cohesiveness of the text. Emotional interest, on the other hand, relies simply on stereotyped emotional language or topics that evoke emotion by themselves in context as well as out of it, such as violence and sex (Kintsch, 1980). Schank (1979) would add power, money (in large quantities), destruction, chaos, romance, and disease as further examples of topics containing absolute emotional interest. Expert reading teachers would, undoubtedly, devote class time to building cognitive interest by shoring up students' prior knowledge about the situational elements of a story, and to building emotional interest by carefully selecting texts that evoke basic emotions in students.

Wade (1992) identified a similar set of variables that can create emotional and/or cognitive interest in a text: (a) topics of inherent interest such as injury, sex, and scandal; (b) a reader's background experience and knowledge; (c) personal relatedness; (d) surprise; and (e) text coherence. Wade was addressing the question of what makes information in a text interesting or uninteresting to readers. In one experiment, she investigated college students' duration of attention and recall of information that varied in

interest and importance, and in another she collected data on the attention strategies of will, effort, and duration. In both cases, students read from the same text that had both expository and narrative elements--a biography of Horatio Nelson composed by the researcher. Wade found that information that had been rated as interesting but unimportant was remembered best, while important but uninteresting information was remembered least.

Textbook writers have tried to create interest by embedding personalized anecdotes and highly interesting but nonessential details in expository materials. Wade (1992) recommended, instead, a shift in focus from how to make texts more interesting to how to make important information more interesting. She also suggested that the way to make texts more interesting and comprehensible is to include appropriate amounts of background knowledge and to focus on text coherence. These suggestions should prove most challenging to publishers of hypermedia texts because they have at their disposal rich resources for visual and auditory enhancement of texts; that is, techniques for creating potential distractions for readers.

Hidi and Baird (1988) investigated how the "interestingness" of textual materials, specifically expository text, influences cognitive performance across subjects regardless of individual differences. For their fourth-grade and sixth-grade subjects, Hidi and Baird reconstructed expository passages on the topic of famous inventors, applying three different interest-producing strategies. The base text was constructed to be coherent and interesting. It included the elements of character identification, novelty, life themes, and heightened activity level.

The second text, called the salient text, was produced by starting with the base text and adding salient descriptive elaborations after several of the important facts in the passage. These additions were elaborations on the main ideas. They were not "seductive details" (Garner, Gillingham, & White, 1989; Schraw, G., Bruning, R., & Svoboda, C.,1995; Wade et al., 1993).

The third text, the resolution text, modified the salient text to present the reader with a need for resolution. Each episode in the resolution text was interrupted at some point by a question directed toward the reader. The answer to the question would complete the account being related.

Hidi and Baird (1988) focused on the effect of these three strategies on students' recall. Although the results of their study showed that only the first strategy, the base text constructed to be coherent and interesting, contributed to a significant increase in recall levels over those typically found for expository texts, the children's interest ratings indicated that the salient and resolution texts resulted in increased subjective interest. Hidi and Anderson (1992) argued that "interest does not simply increase the quantity of learning, but tends to change recall patterns and results in more qualitative differences" (p. 229).

Krapp (2000) attempted to explain the elusive development of situational interest into individual interest through his functional model of interest genesis. His assumption was that the control of interest development takes place on at least two levels of information processing: goal clarification and development of an intention to look at a new potential area of interest, and continuous evaluation of the area of interest. It is at the second level, the level of evaluation, that an individual's needs, such as the need for

competence, play an important role. "It is postulated that a person will only engage continuously in a certain topic area if he or she assesses it, on the basis of rational considerations, as sufficiently important (value-related valency) and if he or she experiences the course of interactions on the whole as positive and emotionally satisfactory" (p. 122).

On the one hand, it seems that it would be relatively easy to trigger students' situational interest, for example, by hands on activities, novelty, discrepancies in what students hold to be true, food, social interaction, author "visibility," modeling, games and puzzles, interesting content, biophilia (the need to affiliate with the environment), fantasy, humor, and narratives (Bergin, 1999). On the other hand, it would be much more challenging for educators to address Krapp's (2000) second level of information processing--continuous evaluation of the area of interest--to transition brief moments of situational interest into more enduring individual interests. Should teachers put aside efforts at creating situational interest in order to focus on building individual interests? Can teachers afford to devote their time and energies to building either situational or individual interests when they are faced with ever increasing curricular and assessment demands?

Hidi and Harackiewicz (2000) challenged the trend over the past two decades of polarizing situational and individual interests or extrinsic and intrinsic motivational influences. They strongly endorsed the use of teaching strategies geared toward creating situational interest, especially for engaging unmotivated students who lack interest and intrinsic motivation for academic activities. At the same time, Hidi and Harackiewicz stressed the importance for teachers to distinguish between educational interventions that

can trigger situational interest, and interventions that will promote the maintenance of situational interest over time. The second type of interventions, those leading to the adoption of more enduring personal interests, are multifaceted, integrated interventions such as the Concept-Oriented Reading Instruction program (Guthrie et al., 1996) discussed above. CORI encourages teachers to employ various instructional strategies such as interesting texts, hands-on activities, self-selected topics, and cooperative learning, that have the power to spark and prolong students' desires to read.

Summary

Interest clearly heightens learning. It begins in the form of situational interest which is spontaneous and environmentally activated, and it may or may not develop into lasting personal interest. Researchers have demonstrated that because interest can be both cognitively and emotionally engaging, an effective motivational strategy for classroom instruction would be to heighten the interest value of learning tasks by manipulating their settings, topics, activities, texts, and social contexts, to create situational interest for students. Situational interest can thus become a point of entry to the acquisition of more lasting individual interest that can energize students' motivation to learn and improve their beliefs about their own competencies.

Interest is domain-specific and greatly affected by classroom environment and by personal relationships among students or between students and teachers. Students might be intensely interested in one class and bored in another because of their reactions to the content of the subject, forms of instruction used by the teacher, or personal skills of the teacher. Thus, in achieving optimal educational outcomes, expert teachers would be

those who are able to create person-activity-social context interactions that heighten the interest value of their academic subjects. This is a skill that distinguishes experts from ordinary teachers.

The next section reviews the field of research in expert theory in general, and pedagogical expertise in particular, to search out where motivational skills such as interest building fit into the repertoire of expert teachers.

Pedagogical Expertise

Expertise research began in the late 1960's when experimental psychologists and computer scientists studying Artificial Intelligence (AI) tried to distill the information-processing ability of humans in order to program that information into problem solving computers. Early studies quickly uncovered significant differences in knowledge structures among persons with different levels of competence (Newell & Simon, 1972). This recognition, in turn, led to further studies of experts in fields such as chess playing, medical diagnosis, and typing, who were distinguished by their thorough knowledge of their domains of expertise and their mastery of the reasoning and problem solving involved in expert performance (Chi, Glaser, & Farr, 1988; DeGroot 1946/1965). Chi, Glaser, and Farr (1988) summarized the key characteristics of experts' performances that were uncovered by psychologists:

1. Experts excel mainly in their own domains.
2. Experts perceive large meaningful patterns in their domain.
3. Experts are fast; they are faster than novices at performing the skills of their domain, and they quickly solve problems with little error.

4. Experts have superior short-term and long-term memory.

5. Experts see and represent a problem in their domain at a deeper (more principled) level than novices; novices tend to represent a problem at a superficial level.

6. Experts spend a great deal of time analyzing a problem qualitatively.

7. Experts have strong self-monitoring skills. (pp. xvii - xx)

Berliner (1986) and his colleagues in educational research looked at expert teachers' performances in relation to the findings of expertise researchers and concluded that master teachers possessed all seven characteristics identified by Chi, Glaser, and Farr (1988), plus two less cognitive ones : "Experts are sensitive to the task demands and the 'social structure' of the job situation" (p. 11); and, "Experts have been shown to be 'opportunistic planners'" (p. 11).

In the field of general expertise research, Dreyfus and Dreyfus (1986) represented a less cognitive approach to the study of expert performances than did earlier researchers such as Newell and Simon (1972). Studying airplane pilots, chess players, automobile drivers, and adult learners of a second language, Dreyfus and Dreyfus observed that experts showed deep situational understanding in solving problems involving difficult, unstructured tasks, and that such understanding was based on an experienced-based holistic discrimination/association that could not be matched by the calculations of a computer. Dreyfus and Dreyfus believed that superiority lay with the human expert who could intuitively recognize a problem and respond without having to decompose and analyze each feature of a problem. Although Dreyfus and Dreyfus (1986) did not examine the skill of teaching, much of what they described about experts acting

automatically, or "arationally," can be said of the intuitive decision-making of an expert teacher.

Berliner (1986) applied the Dreyfus and Dreyfus (1986) model of expertise to teaching, giving the example of the expert teacher in classroom recitations who knows where to be and what to do at the right time without having to think about it. "We might, however, want to think again about the qualities that mark an expert, including fluidity in action, holistic similarity recognition, intuitive and apparently nonreflective patterns of response, and so forth" (p. 24). Expert teaching requires such fluid performance based on practiced understanding more often than calculative problem solving. Berliner's observation has become even more relevant in the complex world of today's classrooms, where there is little time for behaving as the AI cognitive psychologists described expert behavior; that is, spending a great deal of time analyzing daily challenges qualitatively.

Sternberg and Frensch (1992) criticized the proponents of artificial intelligence systems for the same reason as did Dreyfus and Dreyfus (1986), that is, for placing too much emphasis on knowledge itself in intelligent functioning. Sternberg and Frensch stressed, instead, the importance of focusing on an expert's ability to automatically and quickly access tremendous amounts of knowledge stored in long-term memory. Recognizing that the global (controlled) knowledge base of competent individuals may be similar, Sternberg and Frensch emphasized that the key to expertise lies in the expert's ability to efficiently access that knowledge in specific situations. This requires both a local (automatic) knowledge base and experience in processing that information that develops over a long period of time.

Sternberg and Frensch (1992) also pointed out the costs involved in achieving expert status. Their three experiments with expert and non-expert bridge players showed expert players to be less flexible than non-expert players when task demands included deep strategic rule changes like modifying the rule determining who began each play, whereas non-experts were more affected by surface changes such as introducing nonsense names for honor cards and suits. What the experts gained in automatizing information processing seemed to be at the expense of flexibility when they were faced with a novel task that did not fit the structure of their knowledge representations.

Early research on expert teaching reflected the same focus that general expertise research did on expertise as a cognitive skill. An example in teaching can be seen in the work of Leinhardt and Greeno (1986). They used qualitative and quantitative methods to analyze the performance of two groups of teachers: eight expert elementary math teachers whose students had achieved high growth scores over a 5-year period, and four novice math teachers who were successful student teachers. Each lesson observed was characterized as an action agenda composed of several action segments, each with a unique content, a goal structure, and a knowledge base. Leinhardt and Greeno noted that expert teachers established an array of classroom routines to simplify the implementation of their agendas; novice teachers did not do so. The well-established classroom routines, such as procedures for handing in papers or correcting homework, became automatic through practice, and freed the skilled teacher to deal with unpredictable events and to monitor student learning.

Leinhardt and Greeno (1986) described skilled teaching as a complex cognitive skill based on two fundamental systems of knowledge: lesson structure and subject

matter. The two researchers found that expert elementary math teachers develop a knowledge base that allowed them to utilize a planning net composed of schemata at different levels of generality, from global activities such as checking homework, to smaller activities such as handing out papers to the class. Leinhardt and Greeno did not ask teachers about their priorities regarding building student motivation or, more specifically, about developing interest in math in their students. Those teachers considered experts were said to maintain student "interest" by continually monitoring students' attention and by calling on them to answer questions or to work problems at the board. Thus, in the cognitive context of their research, Leinhardt and Greeno (1986) equated interest with attention.

In interest research, however, attention and interest are distinct concepts. Shirey and Reynolds (1988) found that among their 24 college subjects, attention did not serve as a causal mediator between interest and learning. When faced with the task of learning 72 unrelated sentences, the students could use strategies independent of attention to learn interesting sentences and thus allocate the greater part of their attention to uninteresting sentences they needed to learn.

The same conclusion regarding the distinct natures of interest and attention was reached by Anderson, Mason, and Shirey (1984); however, their third-grade subjects did not control their attention as efficiently as the college students in the Shirey and Reynolds experiment (1988). Anderson, Mason, and Shirey tested the recall of third graders when presented with interesting and uninteresting sentences in the context of two different reading group instructional methods: emphasis on meaning groups and emphasis on accurate oral reading groups. In both groups, children seemed to switch on attention

(measured by reading time) for interesting sentences and switch off attention for uninteresting sentences, even when the sentences were presented in close succession. The children did not control the allocation of their attention in order to learn uninteresting sentences.

The work of Carter, Sabers, Cushing, Pinnegar, and Berliner (1987) also was based on the cognitive tradition of expertise research. In one experiment, they compared the performance of six postulants, six novice, and eight expert math and science teachers on experimental tasks resembling those faced by real teachers. Subjects were given 40 minutes to prepare a two-day lesson plan for an unknown class of students that they were supposedly assigned five weeks into the school year. The only information the subjects were given about their new students was a short note left by the previous teacher, a grade book with grades and attendance, student information cards containing demographic information on one side and teacher comments about the student on the other, corrected tests and homework assignments, and the textbook used by the former teacher. In a follow-up study, Sabers, Cushing, and Berliner (1991) asked their teacher subjects with varying experience to view three television monitors which simultaneously showed different views of a junior high science class. The teachers were then questioned about the classroom management and instruction that occurred on the videos.

Based on interviews with the subjects in both experiments, Carter et al. (1987) and Sabers et al. (1991) found similarities to experts in other fields in the ways expert teachers processed salient classroom information: (a) the expert teachers demonstrated better memory for relevant information and the novices showed better memory for details considered irrelevant by experts, (b) expert teachers possessed a rich schemata of

knowledge and experience about students and teaching that allowed them to interpret information meaningfully, and (c) experts were able to recognize and solve potential problems quickly. All the teachers appeared to be concerned about building student interest; however, novices saw this as a matter of managing student behavior, while experts thought of creating student interest as a matter of giving attention to the total classroom environment. Unfortunately, the teachers were not questioned specifically about their understanding of what student interest is and what impact it might have on learning.

Educational researchers viewing expertise from a less cognitive viewpoint recognized the important role of motivational techniques in the success of expert teachers. Shulman (1987) used three categories to describe pedagogical expertise: (a) content knowledge, (i.e., knowledge of the teacher's subject matter); (b) pedagogical knowledge, (i.e., knowledge of how to teach in general); and (c) pedagogical content knowledge, (i.e., knowledge of how to teach a specific subject). Within the area of pedagogical knowledge, Shulman included knowledge of how to motivate students by adapting to student characteristics: "To reason one's way through an act of teaching is to think one's way from the subject matter as understood by the teacher into the minds and motivations of learners" (p. 16). Shulman did not speak specifically about student interest, but he advised teachers to fit material to relevant aspects of students' motivations. Personal interest would certainly be considered a relevant aspect of motivation.

A similar, less cognitive approach marked the research in pedagogical expertise during the following decade with the use of terms such as *insightful, intuitive*, and

reflective, to describe expert teachers (e.g., Bereiter & Scardamalia, 1993). Bereiter and Scardamalia (1993) reduced the characteristics of expert teachers from the dozens identified in effective teaching research to just two: reinvestment and progressive problem solving. These traits, in their opinion, were what separated expert teachers from the many experienced nonexpert teachers found in most schools. "Experts, we propose, tackle problems that increase their expertise, whereas nonexperts tend to tackle problems for which they do not have to extend themselves" (p. 78). The experienced nonexpert teacher described by Bereiter and Scardamalia viewed problems as obstacles to be eliminated for the maintenance of an orderly classroom, while the expert teacher tackled problems in an ever ascending order of representation, reinvesting her efforts in the process in order to find better and better solutions.

Sternberg and Horvath (1995) presented a prototype categorization of three common features among expert teachers: (a) domain knowledge, (b) efficiency, and (c) insight. They proposed that there is no specific set of standards that all experts meet, nor is there an all encompassing ad hoc quality they must possess such as a disposition toward reflective practice. The feature of extensive and accessible knowledge in domains of specialty is, for Sternberg and Horvath, the most fundamental difference between experts and novices. These researchers described content and pedagogical knowledge of expert teachers as being well organized, integrated, and efficient, in the form of scripts, propositional structures, and schemata. Experts bring insight to bear on the solution of problems, and in the process of looking deeply into the problems and redefining them; they are able to reach creative solutions. Unfortunately, Sternberg and Horvath did not discuss the dimension of human understanding by which teachers know and can relate to

their students. Teachers with such understanding would likely possess the knowledge of how to motivate students to want to learn.

Researchers have begun to study the performance of exemplary literacy teachers , (e.g., Bogner, Raphael, & Presley, 2002; Pressley et al., 2001; Sturtevant & Linek, 2003; Wharton-McDonald, Pressley, Hampston, 1998), although they generally study teachers' motivational skills together with other instructional skills. Summarizing their research on effective instruction at the elementary level, Pressley, El-Dinary, Marks, Brown, and Stein (1992) addressed the power of interest to motivate students by including among five characteristic behaviors of effective teachers, two that related to interest-building: (a) They increase the general motivational and interest level of the classroom (e.g., reading of good literature rather than simply proceeding through each story in a basal text); and (b) they design instruction for particular students matched to their particular interests and abilities. The other three characteristics of effective teachers were that (c) they make improvement of the strategic processing of each student in their classrooms an important goal, (d) they downplay egoistic comparisons between students, and (e) they develop a cooperative learning community in which teachers and students are dedicated to relating to one another to foster the development of students' academic competence and autonomy.

Pressley, Yokoi, Rankin, Wharton-McDonald, and Hampston (1997) surveyed 62 fifth-grade teachers who were nominated by their supervisors as outstanding in promoting the literacy of their students about their beliefs regarding effective literacy practices in general. Of the eight motivating techniques mentioned by these teachers, only one concerned interest building—stimulating curiosity. The other seven were

related to other motivational constructs including self-efficacy, perceived competence, and stressing effort over ability. However, when teachers identified the instructional materials they believed were effective, their attention to student interest was apparent. The teachers chose a variety of texts, including children's classics, trade books, novels, audio tapes, etc. They also encouraged student-selected reading materials and student-paced reading.

Ivey and Broaddus (2001) surveyed 1,765 sixth-grade students in reading and language arts classrooms in 23 diverse schools about their motivations for reading. Follow up interviews were held with 31 of the students in three classrooms. The results of their survey indicated that what students valued most in their reading and language arts classes was free reading time and having the teacher read out loud to them. What students said motivated them to read was finding good materials to read and having choices in the selection of these reading materials. Ivey and Broaddus found that, unfortunately, these adolescent preferences could not be satisfied in most middle school literacy classrooms.

Highly accomplished teachers have learned to establish classroom environments that motivate students to read challenging texts and to produce their best work. Block, Oakar, and Hurt (2002) pointed out this accomplishment in their macroanalysis of reading instruction in 647 locales. They found that ability to motivate was one of six key domains of teaching expertise among exceptional pre-school through grade five teachers. It seems clear that this would not be possible if the teachers could not interest their students in the act of reading. Often, highly competent teachers, like experts in other fields, are not aware of their levels of expertise (Berliner, 1986; Block, Oakar, & Hurt,

2002; Meyer & Booker, 2001). For example, one participant in my study, Ms. Johnson, commented: "In my perception, I think that I'm like everyone else…but I'm hearing all this stuff that kind of surprises me, like 'You're an excellent teacher'" (5/17/06 interview). Expert teachers need to be carefully observed in their interactions with students and prodded to articulate what they do by the focused questioning of an observer in their classrooms.

Summary

Experts possess extraordinary capabilities that are learned over long periods of practice and are not necessarily translatable to other arenas. Having acquired a great deal of experience in their fields, experts see meaningful patterns and fundamental principles in complex tasks and this enables them to solve problems and make decisions quickly with few errors. In addition, experts have strong self-monitoring skills and a high level of motivation for continuous self improvement (Chi, Glaser, & Farr , 1988).

Expert literacy teachers possess all of these characteristics plus a sensitivity to the demands and social structure of their job situations. They are also opportunistic planners. Years of experience have trained them to create rich learning environments in the midst of assorted curriculum requirements and complex human relationships. Many years of practice also have been required for expert teachers to develop the skill of sustaining the interest of poorly motivated students (Berliner, 1988).

What helps experts persevere throughout long years of training is a high level of motivation and striving for excellence (Ericsson & Smith, 1991). Posner (1988) suggested that in identifying potential for expertise one needs to consider not only people's innate ability, but also their interest in the field: "The problem of producing an

expert may be not so much in selecting someone who has special capability, but to create and maintain the motivation needed for long continued training" (p. xxxv). The accomplishments of expert teachers can benefit others in their profession by providing models of excellent teaching. Hopefully, the detailed descriptions of expert teaching reported in my study will achieve this goal.

Chapter III: Methods

Researcher Stance

LeCompte and Preissle (1993) pointed out that the personal characteristic that most affects qualitative research is the investigator's own identity as data collector. Thus, I begin this chapter by explaining my approach to this research project, and how I went about making meaning as I collected and analyzed my data. Afterwards, I present my research design and the *what, who, where, when,* and *how* elements that made up that design.

The purpose of my study was to produce rich descriptions of expert middle school reading instruction that might serve as models for classroom teachers wishing to improve their motivational skills. I also had in mind the novice teachers whom I train at the college level. They all share a deep concern about how they will motivate their students to become engaged in various academic tasks. Novices tend to imitate the only models of day-to-day instruction usually available to them, their supervising teachers. I hoped that my study would broaden their experience by presenting three alternative models of motivational teaching.

I used qualitative research methodology for my multi-case study of three expert literacy teachers. This approach allowed me to create a "window" to the classrooms of these model teachers though which readers of my study would be able to "hear" the experts teach, "see" their actions, and "listen" to them describe the meanings they gave to their professional worlds.

My belief is that every teacher is actively engaged in creating her own professional world and her own standards of teaching excellence as she interacts daily

with students, colleagues, parents, and supervisors. I have learned from my own experience as a middle school teacher and from my experience in identifying mentor teachers for my college students that ambition for excellence is a unique trait among teachers. Only a few on each school faculty will demonstrate the vision and drive necessary to become experts in their field.

The three women I selected for this study have set high standards of teaching excellence for themselves. I set myself the task of trying to look over their shoulders to see the people they interacted with from their points of view and to understand the events that occurred in their classrooms as they interpreted them. I also set out to learn the three teachers' beliefs about the role of interest in motivating students to read and I wanted to understand how they developed those beliefs. Bogdan and Biklen (1992) described the basis for a symbolic interactionist perspective such as mine in this way:

> People act, not on the basis of predetermined responses to predefined objects, but rather as interpreters, definers, signalers, and symbol and signal readers whose behavior can only be understood by having the researcher enter into the defining process through such methods as participant observation. (p. 25)

I tried to follow this advice by using every opportunity to assist each teacher and become a participant in their classroom. However, expert instructors are well planned and well organized, so often there was little for me to do but distribute materials or offer help to students during their seatwork activities. Also, teachers' aides were regularly present to assist special education students with their seatwork. Nevertheless, my efforts

were rewarded as I was warmly welcomed and often approached by students when I came to their classrooms.

Research Design

My qualitative multi-case research design was what Stake (2000) called *instrumental case study*. Even though the particular teachers were examined in great detail, the main purpose for the investigation was not my interest in the participants themselves, as it would be in an intrinsic case study, rather it was to gain insight into the process of motivation for reading.

> I call it *instrumental case study* if a particular case is examined mainly to provide insight into an issue or to redraw a generalization. The case is of secondary interest, it plays a supportive role, and it facilitates our understanding of something else. (Stake, 2000, p. 437)

I jointly studied three participants in order to investigate the phenomenon of expert literacy instruction with regard to motivating adolescents to read.

The bounded system I set for this multi-case study was a group of three experienced middle school teachers who were identified as expert reading teachers by their principals, district supervisors, and assistant superintendents. I expected common features to emerge as I studied the teaching of the three participants; however, as Sternberg and Horvath (1995) pointed out, there is no well-defined standard that all experts meet. Instead, "Experts bear a family resemblance to one another, and it is their resemblance to one another that structures the category 'expert'" (p. 9). With this in mind, I did not use an observation checklist of expert teacher behaviors nor comparison

charts juxtaposing the participants' behaviors, because a focus on bases for comparison can cloud over the uniqueness and complexities of a case (Stake, 2000). I did anticipate, however, that I might find some shared perspectives or common definitions expressed by the teachers based on their years of experience in honing their motivational skills. A few "markers" I thought might surface from the data to signal expertise in creating student interest in reading were (a) knowledge of students' personal interests, (b) use of multiple texts to match students' interests, (c) encouragement of student choice in selecting books, and (d) modeling enthusiasm for reading and writing. These are characteristics of good literacy teachers that I have noted in my past experience as a middle school teacher and principal and that often appear in research literature concerning effective teaching (e.g., Dolezal et al., 2003; Wharton-McDonald, Pressley, & Hampston, 1998).

I expanded the scope of this investigation to include language arts classes because there are few classes designated as reading classes at the secondary level. Furthermore, teaching reading skills and how to learn from various kinds of texts are goals of language arts instruction at the middle school level. I also collected data on instruction in writing and speaking because these are literacy skills closely related to reading, and teaching them effectively would be included in the instructional repertoire of an expert reading teacher.

School Contexts

I chose for my investigation two Mid-Atlantic public school districts that are geographic neighbors of the college where I work because I would more easily be able to obtain access to their schools than to others where I was not known.

School populations are small in this region so the best teachers are not difficult to spot. The area is for the most part rural, with farming and fishing as main industries; however, changes in the character of the region are rapidly occurring due to new suburban housing development. Enrollment in the three middle schools where my participants were employed averaged 400 students, of whom approximately 25% were African-American and 40% were eligible for free and reduced-priced meals.

All three schools included in this study were Title I eligible schools. Blue Heron Middle School (Pseudonyms are used for all schools.) serves a mixed population of low and high socio-economic level families. In the two years prior to my study, the school had failed to reach the state's testing benchmarks for adequate yearly progress in reading and math. The teacher participating in my study, Ms. Michaels, was assigned groups of students whom she explained were performing just below passing on their standardized reading exams but who were capable of doing much better with a little more attention. It was her task to help them pass.

The student population of Blue Heron had been slowly declining in the few years previous to my study due to an increase in the number of retired persons moving into the area and the elective transfer of students to higher performing schools. The principal had been at Blue Heron for just two years. She transferred to another school at the end of the second year, while I was conducting my research project.

Bayside Middle School is located in the same school district as Blue Heron Middle School. The area has a stable population, with many residents employed in local fishing businesses. The principal had been at the school for three years when I began my study. She was proud to say that Bayside Middle School had reached adequate yearly

progress standards through a concerted effort on the part of the faculty. She also pointed out that Bayside enjoyed strong support from its parents. In recent years, the parents had been very vocal at school board meetings about keeping their school open in spite of small enrollment.

Chesapeake Middle School is located in a different school district from Blue Heron and Bayside Middle Schools, and includes only three grades at the middle school level: sixth-, seventh-, and eighth-. The other district includes grades five through eight. Chesapeake Middle School serves a region that is quickly changing in character from a rural to a suburban community because of a rapid population increase. Its rising standardized test scores reflect the changing occupations of its working population, from agricultural and fishing employment to professional occupations. The school's principal was an accomplished instructional leader.

The language arts curriculum for all the schools was based on the state's required curriculum which included reading standards for each grade level in these categories: general reading processes, comprehension of informational text, and comprehension of literary text. The middle schools in Chesapeake's district used the *McDougal Little's Language of Literature* textbook; Bayside and Blue Heron used the *Houghton Mifflin Reading* series. The three participants had the freedom to select additional texts to complement the state's curriculum and each chose novels, poems, etc. that they felt would interest their students.

The 2006 state reading assessment passing percentages for Blue Heron and Bayside Middle Schools averaged 10% lower than the state average scores. Chesapeake

Middle School's passing percentages, on the other hand, averaged 10% higher than the state scores.

Participant Selection

In my role as a college supervisor of teacher interns, I have had close contacts with school districts for many years. This made it possible for me to obtain the support of local school administrators for my research and to have open conversations with them about the qualities of their best teachers. I explained that I chose my research topic because motivating students is of such deep concern to the preservice teachers I train and that I wanted to increase my own knowledge in this field. Also, I informed them that there would be complete anonymity for their teachers, schools, and districts. They were pleased that their teachers were being "featured" in a research study because this happened so seldom in their region.

I used a purposeful sampling method together with a reputational case selection method in choosing my teacher participants. Purposeful sampling "is based on the assumption that the investigator wants to discover, understand, and gain insight and therefore must select a sample from which the most can be learned" (Merriam, 1992, p. 61); reputational case selection is based "on the recommendation of an 'expert' or 'key informant'" (Miles & Huberman, 1994, p. 28).

In the first county, I met individually with the assistant superintendent of instruction and the district language arts supervisor and asked them to nominate middle school teachers they thought exemplified the characteristics of expert reading teachers. I suggested that they choose teachers who were most effective in consistently producing

high student motivation. There was no hesitation in their responses as they told me the names of their best teachers. When I asked them what criteria they were using in identifying participants, the assistant superintendent explained: "They [nominees] have good reputations with their parents and their principals;" and "They get good test results" (1/17/06 Administrator interviews). The language arts supervisor said she considered which teachers were creative and good motivators. After eliminating one teacher they recommended because she taught only one reading class, I selected Ms. Lacey, from Bayside Middle School, and Ms. Michaels, from Blue Heron Middle School. (Pseudonyms are used for the teachers and their schools.)

The assistant superintendent and language arts supervisor in the second county suggested the same person, Ms. Johnson, from Chesapeake Middle School, because according to the district supervisor, she was "way better than all the other middle school teachers in motivating students" (1/18/06 administrator interviews). When I asked them to characterize Ms. Johnson's teaching, the assistant superintendent responded "She works magic with her low level kids;" the supervisor said "She keeps all her students engaged" (1/18/06 administrator interviews).

Next, I met with each principal of the three schools where the teachers were working and also asked them to recommend expert reading/language arts teachers on their faculties. The principals confirmed the nominations of the central office administrators. When I asked about their criteria for selecting their best teachers, one principal mentioned "She's [Ms. Lacey] great at motivating her students" (1/23/06 principal interview). Another said "Whenever I observe her [Ms. Johnson] I notice that

all her kids are engaged in the lesson" (1/24/06 principal interview). One principal smiled and said "You'll see for yourself" (1/23/06 principal interview).

There were no reading specialists in the three schools to nominate teachers for my study. Chesapeake Middle School had a lead teacher who was not certified as a reading specialist. The other two schools were occasionally visited by a newly appointed lead teacher who was in charge of language arts in all the district's schools, kindergarten through grade 12. Her recent professional background was in school administration.

Table 1

Teacher Characteristics

Name	Grade Level	Educational Level	Area of Certification	Teaching Experience	Race
Johnson	7 & 8	BA & M.Ed	Elem. & Middle	25 yrs.	African/Am
Lacey	6	BA	Elem. 1-6	12 yrs.	Caucasian
Michaels	5 & 6	BA & M.Ed	Elem. 1-6	12 yrs.	Caucasian

Teacher Profiles (Additional details about the participants are reported in chapter four.)

Ms. Johnson. The participant with the most experience teaching was Ms. Johnson. She had been teaching at Chesapeake Middle School throughout her 25 year career.

> I was in a teaching mode even as a child. I always wanted to teach. I can't remember anything else I ever wanted to do. Also, my sister was an excellent

teacher. When I started teaching I taught at 7th grade and she taught at 8th grade. And then she became my vice principal here at Central" (6/06/06 interview).

Ms. Johnson was highly successful in training teacher interns. She was assigned an intern from my college almost yearly and was always able to develop their talents and self confidence. At the time of my study Ms. Johnson was also chair of her School Improvement Team. Her teaching responsibilities included seventh- and eighth-grade language arts. One class was made up of high performing students and another of low performing students. The others were mixed by ability.

Ms. Lacey. Ms. Lacey had moved to the Bayside Middle School area from a northeastern state six years earlier. Her father was a teacher, and she believed that it was hearing about his experiences as she grew up that predisposed her to consider a teaching career. It was her high school English teacher, though, who inspired her most. "I took an English AP class and read things like James Joyce and a whole bunch of different genres and authors and she made it really exciting. And that's who inspired me, I'd say" (5/10/06 interview).

She began as an elementary teacher for the first six years of her professional career, but later accepted a middle school language arts position at Bayside because that was the only open teaching position when she and her family settled in the area. At the time of my study, Ms. Lacey had been at Bayside for six years and currently was teaching sixth- and seventh-grade language arts and directing the annual school musical production.

Ms. Lacey and her classroom environment shared a sparkle that formed my positive first impression of her. Her liveliness and warmth made her approachable and

easy to share small talk or shop talk with. However, she seemed intimidated by the prospect of being video taped while she taught and asked about who would be viewing my tapes and whether I would be publishing my study. I tried to calm her anxieties by telling her how highly regarded she was by her supervisors who had recommended her for my study and how careful I would be to guard her anonymity. I also gave her the exact dates I would be coming to her classroom to observe so that she would not be surprised when I arrived.

Ms. Michaels. In responding to the question of why she became a teacher, Ms. Michaels responded "I always loved kids and being with kids. I was one of the oldest of my cousins so whenever we had family gatherings I would always sort of entertain all of them—the kids…I find it satisfying to be in charge of kids" (6/13/06 interview).

Ms. Michaels was certified in elementary education and taught in those grades for seven years before she was transferred to Blue Heron Middle School to work with the lowest level students. At the time of my study, Ms. Michaels was teaching fifth-, sixth-, and seventh-grade language arts. During the previous school year she was given the task of teaching reading skills to failing sixth- and seventh-grade students who were failing state assessments but who were considered capable of passing with specialized help.

> Until last year I used to have the ones at the bottom and would teach very basic things like phonics skills and it was really successful and I guess that is why they said "Oh well, why don't we have you do this now." Which is flattering that they had faith in me. But I still worry about my guys down there. (6/13/06 interview).

Procedures

I obtained approval for my research proposal from my dissertation committee in the fall of 2005 and planned to conduct my study during the second half of that school year. I wanted to collect data on all three expert teachers at the same time of year in order to have a more accurate means of comparison than I would get from observing individual teachers at various times of the year when students might be at different levels of maturity or competency in reading. The general characteristics of the three participants are outlined in Table 1.

The principals were concerned that my field work might interfere with preparations for standardized testing, so they asked me to wait until state testing was completed in the middle of April. On April 19th I began my fieldwork. Table 2 outlines the timing of my research procedures.

Table 2
Timeline for Research Procedures

Dates	Procedures
January: 17	interviewed two assistant superintendents and two language arts supervisors to solicit their nominations of expert reading teachers
18	interviewed one assistant superintendent and one language arts
23	supervisor of another school district
24	interviewed two principals to solicit their nominations
April: 19	interviewed one principal in another district
20	observed Ms. Michaels
26	observed Ms. Lacey
28	observed Ms. Johnson
May: 1	ob – Lacey
3	ob – Michaels
8	ob – Lacey
8	ob – Michaels
9	interviewed Michaels & -- member check
10	ob – Johnson
10	ob – Lacey
16	interviewed Lacey & -- member check
17	ob – Michaels
17	ob – Johnson
	interviewed Johnson & -- member check
19	--- Preliminary data analysis ---
24	ob – Michaels
25	ob – Lacey
30	ob – Michaels
June: 1	ob – Johnson
1	ob – Lacey
3	interviewed Lacey
12	ob – Johnson
12	ob – Johnson
13	interviewed Johnson
September: 6	interviewed Michaels
7	ob – Lacey
7	ob - Lacey
8	interviewed Lacey & -- member check
8	ob – Michaels
11	interviewed Michaels & -- member check
12	ob – Michaels
13	ob – Johnson
26	ob – Johnson
	interviewed Johnson & -- member check
October-December	--- Data Analysis ---

To meet the challenge of establishing validity in my qualitative study, I employed multiple methods of collecting data: video taping, transcribing, and reviewing all lessons; writing field notes during observations of lessons; keeping a research journal to document my questions, insights, methodological concerns, interpretations, etc.; audio taping interviews; and collecting classroom artifacts.

Observations. During the eight weeks from mid-April to June, I observed each teacher once a week for 2 ½ to 3 hours. Each visit included at least two full class periods and either a third period or recess or planning period, depending on each teacher's schedule. The observations were on Mondays, Wednesdays, and Fridays, rotating weekly for each teacher; that is, the teacher I observed on Monday I then observed on Wednesday the next week and on Friday the following week, and so on, in order to create a balanced picture of weekly classroom life. Also, I observed each teacher for two days in September to see how they began a school year with a new group of students; I also interviewed them once again that September.

From the back of the classrooms I video taped and later transcribed all the lessons I observed—20 class periods for each teacher. I set up the camera on a tripod to free myself to assist the teachers and to free my hands for note taking. Occasionally I needed to swing the camera from side to side to follow the movement of teachers around their classrooms, but for the most part, I was able to write summary field notes on what I saw the teachers saying and doing, what gestures and postures they used, what teaching strategies they employed, their room displays, and the gist of conversations between teachers and students. The students seemed to adjust quickly to my presence. After the first two observations, they did not appear to be distracted by my filming. I viewed all

the video taped lessons at home in order to fill in gaps in my field notes and generally to check for any events I may have missed while I was filming instruction.

During the first month I kept a tally every 10 minutes of how many students appeared to be on task because on-task behavior has been associated in previous research with excellent teaching and student motivation (e.g., Dolezal, Welsh, Pressley, & Vincent, 2003; Wharton-McDonald et al., 1998). I converted my tallies to percentage rates of students who were appropriately on task and found that in Ms. Johnson's and Ms. Michaels' classes most students were engaged in learning activities throughout their classes—approximately 90 to 95 percent of the time. In Ms. Lacey's class, students were on task 80 to 85 percent of the time. I attributed the lower rates in Ms. Lacey's classes, in part, to the time of day I usually observed—afternoons, immediately following recess. I did not continue counting on-task behaviors in the second month because my results were so consistent during the first four weeks and because I wanted to free myself to record other behaviors.

After each observation and during my car ride home, I audio taped my research journal reflections and transcribed them as soon as possible, usually the same day, clarifying and elaborating my thoughts while they were still fresh in my mind.

Interviews. Once in mid-May, once in early June, and once in September, I held in-depth, semi-structured, audio taped interviews with each teacher in her classroom, either after school or during her planning period. The transcriptions of these interviews later proved to be the richest source of data for me in addressing my research questions. At the beginning, the teachers were nervous and answered my interview questions only briefly; however, by the end of the first interview and for the second and third, they

seemed relaxed and eager to elaborate their views on motivating students. I encouraged them to pursue their own topics when my questions reminded them of related issues.

In the first interview, I focused on elements in the teachers' personal histories that led them to choose teaching as a career and on the experiences that shaped the teachers they are today. Some of the questions I asked were "How did you decide to become a teacher?" and "What were some of the most powerful influences on shaping the kind of teacher you are today?" (See Appendix B for a full list of interview questions.)

In the second interview, I asked the teachers to define interest so I could understand the meanings they gave to this key concept. I also tried to learn what perceptions these teachers had about the instructional discourses and practices that foster students' interest in reading by asking them about their beliefs regarding how reading should be taught to middle school students and how children can be motivated to enjoy reading: "What are your beliefs about how reading should be taught to middle school students?" "How do you cultivate students' interests?" (See Appendix B.)

At this second interview I shared with the participants my preliminary findings. Gall, Borg, and Gall (1996) recommended this "member checking" as "the process of having [participants] review statements made in the researcher's report for accuracy and completeness" (p. 575). My preliminary findings consisted of a list of common beliefs the teachers shared about the importance of interest in motivating adolescents to read and about the need to create a safe learning environment and provide instructional scaffolding prior to building interest. The teachers readily agreed with my findings.

After the September observations, I interviewed my subjects about their first steps each year in motivating students to read: "What attitudes toward reading do students

usually come to you with in September?" and "How do you make decisions about seating arrangements, grouping, and time allocation?" (See Appendix B for more questions.)

Again, I encouraged the teachers to speak about topics they considered important; therefore, other questions followed opportunistically from the participants' comments. They were anxious to discuss what occurred in their lessons and why they did or said something. I used this final interview as another member check opportunity to validate my preliminary findings. I explained to each participant the most frequent categories of expert teaching I had observed in their classrooms and the themes I saw emerging from those data. Each teacher agreed with my conclusions.

Artifacts. My data included samples of student journal writings. Instead of simply describing the stories they were reading in class, the students were encouraged by the participants to express their feelings and opinions regarding the characters' personalities and actions. Ms. Michaels used a double entry journal format by which students summarized a text on the left-hand side of a page then wrote their personal responses on the right-hand side. Ms. Lacey used response journals in which students wrote their reactions to a text on the left-hand side and she responded on the right-hand side of a page. Ms. Johnson would assign personal responses to be written in a particular style such as persuasive or explanatory writing.

Other artifacts included lists of items that might contribute toward a motivational classroom environment: instructional materials used by each teacher, and quantities and types of classroom library materials. In my interviews I asked the teachers to explain how they used these materials.

Data Analysis

Coding categories. The procedures I used to analyze my data were analytic induction and enumeration. Analytic induction "involves scanning the data for categories of phenomena and for relationships among such categories, developing working typologies and hypotheses on an examination of initial cases, and then modifying and refining them on the basis of subsequent cases" (LeCompte & Preissle, 1993, p. 254). Gall, Borg, and Borg (1996) explained that some qualitative researchers develop their own categories for sorting and examining data while others use lists of categories developed by other researchers. I began by collecting dozens of codes that have been used in research on teacher effectiveness to describe motivational behaviors (e.g., Pressley et al., 2001).

Soon I realized that it would be wise for me as a neophyte researcher to create focus in my study by narrowing my data analysis to only those categories having most to do with creating interest in literacy. For example, I decided against using labels such as "manipulatives/concrete representatives" and "multiple representations of tasks" (Dolezal et al., 2003) because those were concerned more with the delivery of instruction than, strictly speaking, with motivation. I guided my selection by reviewing the categories used in the following studies that concerned teacher effectiveness and literacy: Berliner (1986); Block, Oakar, and Hurt (2002); Bogner, Raphael and Pressley (2002); Carter, Sabers, Cushing, Pinegar, and Berliner (1987); Dolezal, Welsh, Pressley, and Vincent (2003); and Pressley, Yokoi, Rankin, Wharton-McDonald, and Hampston (1997).

My first category list consisted of 53 codes but I saw that some overlapped and others had very few applications to my research questions, so I refined my list to 38

codes. This process continued throughout the first four weeks of my study. At that time, mid-May, I establish 21 final categories and began my preliminary data analysis. Of these 21 categories, the following 14 describe teacher behaviors that support motivation in general. They can be grouped under the broader heading of "General Motivational Behavior and Characteristics:"

clear goals and expectations	positive management
cooperation encouraged	praise and encouragement
engaging activities	scaffolding
enthusiasm for learning	stimulates creative thinking
extrinsic motivators	stimulates deep thinking
games/play/drama	stimulating environment
positive atmosphere	student choice

Next, I selected three "General Expertise Behavior and Characteristics" categories that have been used in pedagogical expertise research (e.g., Berliner, 1988) and in research on expert performance in fields other than teaching (e.g., Chi, Glaser, & Farr, 1988):

analyzes problems qualitatively

knowledge of students

opportunistic planning

Lastly, I included four categories of behavior for "Building Interest in Reading" that create interest in reading and writing (Guthrie & Davis, 2003; Wigfield, 1997):

creating curiosity

creating suspense

creating relevance

providing interesting texts

(See p. 100 for definitions and examples of each coding category.)

Preliminary data analysis. After four weeks of observing and one set of interviews I felt I had accumulated enough data for preliminary data analysis. I completed this first level of analysis within each case before attempting any comparisons across cases. First, I inductively coded all the transcriptions of my video tapes, audio tapes, and field notes using a computerized qualitative data analysis program, *HyperResearch 2.6* (Dupuis, Hesse-Biber, & Kinder, 1997-2005). This software also allowed me to refine my original list of 53 categories through the process of enumeration, adding, deleting, re-naming, and re-coding them throughout the study according to the frequencies with which they appeared.

Secondly, I looked for relationships among the categories, searching for potential themes, patterns, and constructs. At the same time, I looked for alternative explanations for my preliminary findings. For example, the participants' belief that the classroom must first be a safe environment for motivation to occur arose early in my discussions with the three teachers. I suspected that this notion might simply be an expression of their managerial styles and not consciously viewed as a means of motivating students to want to read and write. However, as I listened to the reasons they gave to students for being considerate and respectful toward one another and as I questioned them in their interviews, I realized that the teachers were constructing classroom "havens" to create environments for learning (e.g., Ms. Lacey: "I understand there was a little altercation during lunch…Let's be respectful of one another and if you feel like you have to talk and

get more of your feelings out, you can write all about it in Writer's Workshop right now instead of doing SSR." 5/10/06 lesson transcript).

Final data analysis. I continued analyzing my data throughout the remainder of my study, mostly on a within-case basis. At the end of the data collection period, I focused on cross-case analysis, again using the 21 categories that most frequently appeared in the enumerated results of my within-case analysis. I looked for similarities and differences among the three participants and in so doing, verified my conclusions about the two themes and the construct that emerged from my study. In my final member checks, Ms. Johnson, Ms. Michaels, and Ms. Lacey agreed with my conclusions.

To test the validity of my results, I asked a colleague in the education department of the college where I work to code all my interview transcriptions using the 21 codes I had developed; I considered the interviews to be the richest source of data in my study. Her coding matched mine 85% of the time.

Summary

The purpose of my study was to produce rich descriptions of expert middle school reading instruction that might serve as models for classroom teachers wanting to improve their motivation skills. I chose to do a collective qualitative multi-case study of three middle school teachers recommended by their supervisors as expert literacy teachers. My goal was to describe their beliefs and behaviors in detail by observing and interviewing them in their classrooms. From mid-April through early June and in the following September, I recorded, transcribed, and coded all my data. Then, by the processes of analytic induction and enumeration, I analyzed my data searching for patterns, themes,

and constructs in the data. The results of my analysis are described in the following chapter, first on a case-by-case basis, then across the three cases.

Chapter IV: Case-By-Case Results and Discussion

How My Results Are Organized

The results of my study are presented first on a case-by-case basis then across cases. In this chapter I present and discuss my findings for each case. To create a classroom context, I first describe the appearance and "atmosphere," of the teacher's classroom environment as perceived by the teacher herself and as it appeared to me. For the same teacher, I then answer the research questions that guided my study: (a) How do three expert middle school teachers generate and sustain interest in reading? (b) What are these teachers' beliefs about the role of interest in motivating students to read? and, (c) What perceptions do these teachers have about the instructional discourses and practices that foster students' interest in reading?

In the next chapter, Chapter V, I present my cross-case results. I discovered an important theme in my data: Interest is a worthy goal in itself. It describes the teachers' belief that interest leads to life-long learning, and it explains their persistent focus on developing personal interest rather than situational interest. I also discovered the important construct of "front-loading," a term used by two of the participants to explain the belief shared by all three; namely, that in order to engender personal interest, teachers must first do this: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

How This Chapter Is Organized

In presenting my findings for each teacher in my multi-case study, I decided to

order the cases according to my assessment of the teachers' levels of general pedagogical expertise from highest to lowest: first, Ms. Johnson; second, Ms. Michaels; and third, Ms. Lacey. In my judgment, all three teachers showed extraordinary skill in motivating their students to read and write; however, in terms of their general teaching skills, Ms. Johnson, who had twice as much experience as the others, was unique in setting high standards for her students and continually tracking each student's progress. Although these are not strictly motivational practices, they, nevertheless, set her apart from the other two teachers in terms of expert teaching; therefore, I present her case first.

Ms. Michaels and Ms. Lacey exhibited similar levels of excellence; yet, Ms. Michaels managed her students' behavior effortlessly whereas Ms. Lacey worked to control her students' behavior. Because of this difference, I present Ms. Michaels secondly.

With each case, I begin by describing the appearance and "atmosphere," of the teacher's classroom environment as perceived by the teacher herself and as it appeared to me. For the same teacher, I then answer the three research questions that guided my study. My objective for this chapter was to provide a rich description of each teacher's motivational practices and the beliefs that guided those practices. The ellipsis points I use occasionally indicate that I have omitted extraneous portions of quotations for the sake of brevity.

Ms. Johnson: Home Sweet Home

Classroom Atmosphere

"This [class]room is like my home and everybody that comes into it is welcome…" (6/12/06 interview). The image of a home expressed Ms. Johnson's

perception of her classroom environment; she saw herself as being a nurturing yet demanding mother to her students. Ms. Johnson was always smartly dressed and spoke with a rich voice that commanded attention, yet her compact shape and rippling laughter suited her motherly image.

> I have to make the environment and the climate in my classroom one that is welcoming to students and that includes the way I present the lesson because I see my job as a big picture. I want to make the people who are visiting my home comfortable, you see, because anything can happen. You can have good conversations when people are comfortable….(6/06/06 interview)

Ms. Johnson kept her "home" tidy and attractive even though it was packed with student desks and work stations. Above the front chalkboard was a row of small posters, each with a motivational quotation such as "The only dumb question is the one unasked," and "Where there's a will there's a way," etc. The opposite wall featured samples of student work and three work stations, one for the teacher and two for students. The station in the far corner had a small table, two chairs, and learning materials for the special education students who came to Ms. Johnson's language arts classes with their special education teachers. The remaining wall had a sink and cupboards on one side of the door and a cork board with a large calendar and various school notices on the other side. (4/26/06 field notes)

Ms. Johnson explained why her student desks were facing each other in seven groups of four:

> The way the desks are set up you know, that is all well thought out…and it is all designed for one reason: Learning cannot take place unless the kids are

> comfortable and they feel that it is a non-threatening kind of environment. No answer is a dumb answer…(6/12/06 interview)

The welcoming, home-like atmosphere that Ms. Johnson created in her classroom was shown in the way she greeted two special education students who came to her room accompanied by their special education teachers:

> Ms. Johnson was just beginning class when two teachers came to the door, each bringing one special education students, a boy and a girl. Ms. J. stopped teaching and greeted them: "Hey, everybody, here's John and Katie [pseudonyms]. Let's give them a hand!" (The other students applauded.) "We're glad to see you…and look how John went right to his seat. Yay! I'm so proud of you." The four newcomers went to the back corner table and began to work; Ms. Johnson continued the lesson. (5/17/06 field notes)

After class, Ms. Johnson explained to me:

> I heard that other teachers were having problems with John and Katie because they wouldn't go to some of their classes, so when they were assigned to me, I decided to give them a big welcome whenever they came to my door. (5/17/06 field notes)

She explained that the feedback she received from the special education teachers was very positive. John and Katie were happy to come to her class and were cooperative about doing the work Ms. Johnson prepared for them.

> The class was quietly doing seatwork when Ms. J. went to the back of the room to check on the special education students. "John, I want you to stand up and read that sentence out loud." (He had been struggling to read it to his special education

> teacher.) John was at first reluctant and looked embarrassed. Ms. J. stood beside him with her hand on his shoulder, encouraging him and helping him pronounce the words. When he finished, the whole class congratulated him with applause. (5/17/06 field notes)

Research Question 1: How does Ms. Johnson generate and sustain interest in reading?

I spoke with Ms. Johnson about how she generated interest in reading and writing with the rest of her students. She replied without hesitation:

> I front-load it. You have to front-load it. You can't just take a text and you can't just teach the kids with the text. You can't do it because there's so many different ability levels, so many different learning styles, and so many different interests. So what you have to do is try to find that common ground, you know. (6/12/06 interview).

Ms. Johnson's idea of "front-loading" as a motivational strategy included learning as much as possible about the emotional and learning needs of students and providing instruction to meet those needs. Front-loading to her was a prerequisite for interest building.

> First I get my data together about their abilities. I find out their learning styles--get all that baseline data together. That's what helps me to decide what materials I'm going to get for them to read….I do a survey of interest and I try to get supplemental materials to match their interests….
>
> The thing I focus on is planning. I plan a lot…and I spend so much time trying to decide what to do if something doesn't work, and what do I do to reteach that, and

> when should I reteach it, and what should I do to enhance those children who need to be enhanced? I spend so much time with that, I don't worry about my teaching style. (9/26/06 interview)

Ms. Johnson's thinking reflected the characteristics of experts that Chi, Glaser, and Farr (1988) found in their study of experts in fields other than teaching: (a) "Experts see and represent a problem in their domain at a deeper [more principled] level than novices; novices tend to represent a problem at a superficial level;" and (b) "Experts spend a great deal of time analyzing a problem qualitatively" (p. xviii).

Ms. Johnson's goal was to build long-term personal interest in her students rather than situational interest for a particular text or learning activity. She described it as being in "for the long haul" rather than for a "quick fix." She had her reading strategies for the year outlined in a binder she called, My Baby. It contained a learning profile for each student which consisted of a matrix with types of reading problems as column headings across the top, and strategies for solving those problems as row headings along the side. Ms. Johnson was eager to share her work with me and paged through the binder pointing out that her objectives were the same for all student but that the texts she used were matched to the reading ability of the students.

> This is my baby. It's very simple. Whether the focus is personification or whatever, the reading ability level could be basic or proficient or advanced—whatever. So you've got a group of four kids who are sitting together focusing on the same thing, but the ability levels and books are different. (6/12/06 interview)

The perception she had of herself as a deliberate planner seemed contradicted by what Ms. Johnson said later in the same interview:

> My teaching style is unique, probably. I think I go from the gut. I do a lot of teaching based on the feel I have for the kids. Depends on the kids, the kind of class. The activities I use to generate interest sometimes are teachable moments. Having had such a long career in teaching I'm able to shift gears very quickly and that is a good thing, I think. (6/12/06 interview)

The "shifting of gears" that Ms. Johnson spoke about is called "opportunistic planning" by Berliner (1986). He described the quick changing of tracks to adjust to teachable moments as a characteristic of teaching expertise, and it is not at odds with spending a lot of time planning. Ms. Johnson's teaching style, therefore, was consistent with the performance of expert teachers studied by Berliner.

I asked Ms. Johnson how she generated and sustained interest: "You (Ms. Johnson) said that you build interest in reading by front-loading a lot of strategy instruction to get your kids ready, but I've seen you do a lot of other things. Would you talk about what else you do to interest kids?" (6/12/06 interview)

> I get them to read a lot. Everyone of them is going to read over 3000 pages this year….They keep book logs and they do book talks….I think because I love reading they pick up on my enthusiasm. There have been times when I would pick a quote or start reading a book and stop at a particular point and it just drives them absolutely nuts because I'll leave off the ending to tempt them. (6/12/06 interview)

Such comments showed that Ms. Johnson was aware of the need to create situational interest as an immediate preparation for reading a particular text in class and she did so with ease; however, her main focus was on building student competency for independent

reading. "I want my kids to enjoy reading because they know they can do it" (9/26/06 interview).

Research Question 2: What are Ms. Johnson's beliefs about the role of interest in motivating students to read?

Ms. Johnson believed that situational interest served as a "hook" to get students to attempt reading or writing. "The problem now with reading has to do with those kids who can't read, who haven't been hooked on reading" (9/26/06 interview). Ms. Johnson offered an example of how she had hooked one very low achieving student the previous year:

> Tyrone (pseudonym) was turned off to reading, period! The fact that he was a black male and big, to read was sissy. You were "gay." But I found out that he liked football and I got all this football stuff—magazines and books on all kinds of levels….He was always in trouble, so I put him in my flexible grouping area. So, he said, "What am I gonna do back there?" I said "I don't know, we'll think of something." So I grabbed a book about football and gave it to him, and he didn't say anything and I didn't say anything to him. Then later he called me over to show me the pictures. (9/26/06 interview)

Ms. Johnson thought of creating situational interest, such as giving Tyrone a book about football, as just the starting point in building personal interest in the process of reading. In her mind, the next step would be strategy instruction in literacy skills:

> He (Tyrone) was interested, you see, so I taught him in class and I'd pull him aside in small groups and I gave him different strategies. I said, "Listen, when you're reading, or when someone is reading to you, get a visual picture," because I knew he was very visual, you know. And I said "If the picture gets cloudy say 'Excuse me, can you repeat this?' If you're reading and the picture gets cloudy, go back and re-read it until the picture gets clear and you'll probably remember what happened." (9/26/06 interview)

Ms. Johnson went on to describe her discussion with Tyrone further and explained how she helped him sound out words in the captions of a football picture book. When time came for standardized testing, Ms. Johnson sent Tyrone off to be tested by his special education teacher with the following advice:

> When you go into the test, you're taking a part of me with you and I want you to do well. You do your best. Your best is all I want. You rock this thing! (9/26/06 interview)

Tyrone scored amazingly well on the state test—a "quantum leap" from his previous scores, as Ms. Johnson proudly explained. "I think that what you do before reading is important. Motivating them, and teaching them strategies. All that's important for their confidence" (9/26/06 interview).

Ms. Johnson instinctively knew what researchers have discovered, namely, that students' perceptions of themselves as competent learners relate positively to their interest in learning (Wigfield et al., 1997).

Research Question 3: What perceptions does Ms. Johnson have about the instructional discourses and practices that foster students' interest in reading?

Ms. Johnson perceived her practice of creating a safe, home-like classroom environment as critical for nurturing students' interests in reading:

> I tell them they should follow up on whatever they're interested in and become experts by reading and writing about those topics….So, you know, I give them choices, which are something else I think helps the home climate and that is what life does. So I try to make sure that the environment in this room is almost life-like. (5/17/06 interview)

She also believed that a teacher should try to create authenticity in her teaching by building connections from the curriculum to students' lives:

> I sometimes talk to them as if I were an employer—the kinds of things I would expect of you and what would help you get a raise….And so the whole environment in the room is trying to make a connection to the real world, real life, things you need to know, things that will help you be successful. (5/17/06 interview)

Ms. Johnson recommended the practice of creating situational interest even though she did not refer to it as such. Her perception was that a teacher fosters students' initial interest in a story by creating curiosity and building suspense about the plot.

"I think that the initial whetting of that whistle, getting them involved in it [a book] makes them want to read" (9/26/06 interview). Ms. Johnson was animated in describing the way she enticed her students to read books:

> I… pick a quote or pick an ending of a book and I'll leave out the ending to tempt them. Or, I'll start reading a book and I'll stop at a particular point and it just drives them absolutely nuts. (9/26/06 interview)

She felt that more capable readers will read more if they are just "teased" to read by having the teacher make them curious about a book. "For my slower readers I start reading the book for them" (9/26/06 interview).

Ms. Johnson summed up her general perception regarding the discourse that builds interest in literacy in the following words:

> I share my love of reading with them [students] and I encourage them to just embrace reading and embrace learning. I also think that the enthusiasm that you have towards whatever it is [texts] kind of spills over; it has to. If you are in my room, it better. (9/26/06 interview)

The students responded positively to Ms. Johnson's encouragement. When she asked for volunteers to read aloud at least half the students would raise their hands.

Ms. Michaels: The Joy of Reading

Classroom Atmosphere

Ms. Michaels seemed genuinely happy to see her students each day. She stood in the doorway greeting each one and commenting on their new clothes, hairstyles, sports events she had attended, etc. They seemed eager to share their news with her. "While we're waiting for everybody to get here, you guys tell me real quick about your weekend. What did you do?" (5/01/06 field notes). She shared a classroom with another teacher so her decorations were limited. Her section of the room contained table space and

materials for student projects and a long window ledge for displaying their projects. Samples of students' poems filled a small corkboard and a wall map of Native American archeological sites showed the setting for the novel, *Bright Moon*, that her sixth-grade students were reading.

The relaxed ambiance Ms. Michaels created in her classroom showed itself even in her physical appearance. Her shoulder-length hair was left loose to frame her face, her full skirts and casual sweaters were generally earth tones, and she usually wore sandals or clogs. I never heard Ms. Michaels raise her voice and often wondered how she managed to control her students' behavior so gently. When I asked her about her management style she explained:

> They [students] may have to look really hard, but I do have some buttons there somewhere. They would have to look really, really hard to find them….I'm not like some teachers who have to act like they're in charge. That's not my style. We're in this together. (9/8/06 interview)

Ms. Michaels' student groups were small, nine or ten students in each, and she arranged their desks in a semi-circle around herself. Students were trusted to leave the room whenever they needed to use the restroom. They were excused with a simple nod of the teacher's head and the signing of a hall pass. The students responded by cooperating with all of Ms. Michaels directives. They generally seemed relaxed, content, and attentive during her lessons.

Monday classes generally began with sharing about everyone's weekend experiences. "I give them all a chance to tell me what they did over the weekend--to have their moment in the spotlight. You really do learn about their interests that way"

5/08/06 interview). Ms. Michaels listened attentively to each student and followed up with comments or questions that showed genuine interest in their family lives. "Ellie, what did you do this weekend? Just a second. Let me close this door so I can hear you better. You went swimming in the river? Was it real cold? I don't think I could do that" (5/01/06 lesson transcript).

Ms. Michaels described her teaching style as making learning fun: "The kids say I'm fun; that I make learning fun….Kids will sometimes come up to me, students that I don't teach, that aren't in my class, and ask if they can be in my class because they heard I was fun" (5/08/06 interview). She believed that the activities she planned were no better than those of other teachers, but that they took place in a non-threatening atmosphere and that that was what made them enjoyable.

A typical example of Ms. Michaels' efforts to create a non-threatening environment was the sensitivity she showed in asking students to share their opinions about the statements in an anticipation guide: "Now some of your opinions might be a little personal, so if you feel you don't want to share that's OK….There's absolutely no right answer. Everyone has their own opinions" (4/19/06 lesson transcript).

Research Question 1: How does Ms. Michaels generate and sustain interest in reading?

Ms. Michaels used the knowledge she accumulated about her students in planning activities that would create individual interest by building on their personal experiences:

> When I sit down to write my lesson plans I think a lot about who is in the class and how I'm going to get them interested and how I'm going to help them enjoy reading and how I'm going to make it fun…like when we were reading our novel

> and Bud (the main character) was eating pancakes for breakfast….I thought about how Thomas (pseudonym for student) would always say he was hungry because he didn't get to school in time to have breakfast in the cafeteria. So I decided we would have a pancake breakfast just like the one in the novel. (6/13/06 interview)

When she anticipated a "disconnect" between the students' prior experience and the setting or time of the novel they were going to read, Ms. Michaels planned activities to help them learn about the region or the time period.

> Some kids have a real hard time enjoying reading because they can't make sense of a story; they can't form visual images of where or when it's taking place. So I'll have them do a little research with a partner or I'll show them some picture books….If I can make it (reading) fun and have them learning a lot, that's the best scenario. (6/13/06 interview)

Ms. Michaels would spend a good deal of time selecting novels that might interest her students. "I think that it [a book] really needs to be interesting and I think the teacher has to enjoy it and have some kind of passion for it too because the kids pick up on that" (9/08/06 interview). She described her criteria for choosing books in this way:

> I pick novels that I really enjoy myself, that have intriguing and interesting characters….I choose well-written novels that have a good flow and are sort of easy to follow along, like you keep wanting to find out what was going to happen. (9/08/06 interview)

Journal writing was an important element in Ms. Michaels' way of motivating her students. "I think it [journal writing] makes them think about a story and why a character is doing whatever. Then they're more likely to get interested in the plot" (6/13/06

interview). The amount of time set aside for this activity was usually five to ten minutes and the students were actively writing the whole time. I recorded in my field notes that her students never complained about journal writing time.

The journal entries followed a format established by the teacher. Each page was divided into two columns, with the heading "summary" at the top of the first, and "reactions" at the top of the second. On one occasion, Ms. Michaels transitioned into journal writing time with the following directive:

> OK, let's take about five to seven minutes to work on our journals. Now, this chapter didn't have a lot happening, so your summary part can be short, but your reactions can be long--your thoughts and feelings. I'm sure you can have lots of reactions to write about. Part of your reaction could be your predictions. (5/01/06 lesson transcript)

Ms. Michaels noticed that the students were slow in starting to write. She went to her flipboard and said to them "Let's make a list of what happened in this chapter. Maybe that will help your memories so you can start writing" (5/01/06 field notes). This scaffolding activity worked and all the students began writing in their journals.

> I walked around reading over the students shoulders. They had pretty much copied items from the flipboard to the left, "summary," side of their journals. The right side, "reflections," was different for each one, with speculations about alternative plot solutions and opinions about the wisdom of the main characters' actions: "If I was Bright Moon I would have run away right at the beginning;" "The Spanish lady was a mean witch to Bright Moon" (5/01/06 field notes).

To her students' delight, Ms. Michaels frequently used simple games as an interest building device for reviewing story plots:

(Teacher hands out dry erase boards and paper towels)

St: "Are we going to play a game?"

T: "Yes, our review today is going to be sort of like a game."

(T waits for quiet)

T: "Are you guys ready? I'm going to ask questions [about the story] and you have to write the answers as fast as you can. When you're finished, hold up your dry erase board so I can read your answer. We won't worry about spelling. The first person to hold up a correct answer gets a prize. Are you ready?"

(T builds suspense by delaying in asking questions) (5/16/06 field notes)

At another time, Ms. Michaels attached a small basketball hoop to her front board and, as students answered her questions about the story they were reading correctly, they could shoot hoops for prizes. Yet another game had the students working in relay teams to organize in chronological order a series of plot event cards. Her review games took only 10 to 15 minutes but were thoroughly enjoyed by her class. Ms. Michaels said she used such games to sustain her students' interest in a novel.

Ms. Michaels often used "popcorn reading" to allow students some choice in how much oral fluency they would practice. In popcorn reading, the teacher sets the parameters in terms of how little and how much students can read orally--for example, one sentence to one paragraph--then students decide how much within that range they will read.

I might set the minimum based on knowing who is in the class. It was sort

> of just so everybody would have a chance to read, but could stay within their comfort zone. I didn't want anybody to feel like they had to read too much and get embarrassed struggling through too much. (6/13/06 interview)

Research Question 2: What are Ms. Michaels' beliefs about the role of interest in motivating students to read?

Although Ms. Michaels did not use the term, front-loading, in our discussions, it was clear that she shared the same belief expressed by Ms. Johnson and Ms. Lacey; namely, that teachers must provide a safe classroom environment and instruction in reading skills to help their students develop interest in reading. She believed that interest also plays an important role in maintaining the motivation of students while they work to improve their literacy skills. If students see that building their reading skills will help them enjoy reading a particular text, they will be more willing to work at acquiring those skills. For example, students need to develop reading fluency in order to "get the flow of a story and enjoy it" (6/13/06 interview).

> I focus on fluency and occasionally I do independent fluency activities with them before we read a story. Fluency helps with their comprehension. If they are stopping every now and then to sound out words it takes away from a lot of good meaning and enjoyment they would get from the text. (6/13/06 interview)

It was important to her to get kids interested in a text, then they would be willing to work on their fluency, and that in turn would help them with their comprehension.

Getting to know her students well was an important personal goal for Ms. Michaels. She believed that it was the key to building interest because it enabled her to

shore up whatever skills or prior knowledge might be needed for students to enjoy reading and writing activities. She gave the example of an eighth-grade boy whom she was able to interest in reading by knowing his learning problems:

> I figured out that a lot of why he wasn't really interested in reading was that he is dyslexic and it was really a struggle for him to read….But when we read *The Giver* we would have some really good deep discussions. And he is a very smart boy. He's very social—half hour conversations, likes to talk, likes to debate—and I think when he saw that a book could really make you think and he could figure things out, that's when he started to check out books. (6/13/06 interview)

Research Question 3: What perceptions does Ms. Michaels have about the instructional discourses and practices that foster students' interest in reading?

In responding to my inquiry about instructional discourses and practices that foster students' interests, Ms. Michaels replied: "You've probably observed me like on a Monday when we'll sit down and talk about what they did on the weekend.…That helps me plan what materials to use that they might like" (5/08/06 interview). Ms. Michaels' practice of discussing the prior weekend with every student was, in her perception, a device for planning how to build connections from students' lives to those of the characters in the novels they would be reading in class.

> Ms. Michaels: "First of all, before we go into our agenda, I want to hear all about your Easter break. Who wants to go first?"
>
> Boy: "I went with my Dad for Easter.

Ms. Michaels: "And where did you go? Did you go some place together or did you stay at his house?"

Boy: "We visited my aunt and her baby. I helped her take care of the baby."

Ms. Michaels: "How old was the baby?

Boy: "Two months."

Ms. Michaels: "Wow, a brand new baby! How did you help take care of him?"

Boy: "I helped change his diaper."

Ms. Michaels: "That was brave of you! Have you done a lot of babysitting?"

(4/19/06 lesson transcript)

The connection Ms. Michaels made from this exchange with a student was to point out that one of the characters in the novel, *Bright Moon*, would have to escape on horseback with her baby and how difficult that might be.

When she presented a new book in class, Ms. Michaels spent a good deal of time developing situational interest by getting students to predict what the story might be about based on the information on the cover. In these discussions she would try to make further connections from the story to the students' lives.

> I've learned that you need to prepare students to enjoy a book. It doesn't happen automatically. I use a lot of pre-reading strategies like anticipation guides and making predictions. I also sometimes have them do a little research about the time period of the story so they'll understand it better. (6/13/06 interview)

She believed that interest was important in helping students to persevere in developing their literacy skills and, therefore, in truly enjoying literature.

Ms. Michaels' perception about effective discourse included modeling her own enthusiasm for reading. Her enthusiasm was evident in the words she used in class: "I can tell you're BUST'IN to tell me what you did this weekend;" "I can see you're all FIRED UP about this story;" "Before you DIVE into your journals…"

She seemed to use the terms interest and enjoyment synonymously: "I want my kids to be interested in reading and enjoy it" (5/08/06 interview). At other times Ms. Michaels spoke of interest as leading to enjoyment "If I get them interested in the characters then they'll enjoy the story more" (5/08/06 interview). On one occasion, when I asked her to define interest, she said "It's when you really want to do something because it's fascinating" (5/01/06 field notes).

Ms. Michaels perceived herself to be an opportunistic planner, ready at any time to adjust her lessons to pick up on the students' interests:

> I tend to pick up on the kids' interests. Like sometimes things I've had planned for the day might go right out the window because something they've picked up on or noticed or become interested in that was different than I was thinking we would do that day--take advantage of the teachable moments. (6/13/06 interview)

Ms. Lacey: Love and Logic

Classroom Atmosphere

I generally observed Ms. Lacey's classes in the afternoon. The first group came from recess, often stumbling in overheated and talking excitedly. Ms. Lacey would turn off the lights to get their attention and tell them to take out a book of their choice for

Sustained Silent Reading (SSR). Then she would pace the room, quietly settling students and helping them find books until everyone was reading; this could take five to ten minutes. There were no warnings shouted at individual students nor threats issued to the class. Ms. Lacey tried to create a positive environment for students.

> My classroom environment is very upbeat, very friendly, non-threatening. The kids know they don't have to read out loud; they won't be embarrassed. We go over the respect rule a lot….And also, I think my big approach is going up to the child individually and not in front of his friends and saying, "You know, we can have a good day." (6/01/06 interview)

Love and logic were the words Ms. Lacey used to describe her management style. "You love them like they're your kids, but you use logic because you're in charge of their safety. You're in charge of their learning, their academics, so you need to be logical" (9/07/06 interview). Ms. Lacey's students responded positively to her warmth and friendliness. I frequently observed them sharing personal anecdotes with her or asking her to come to their sports events.

Ms. Lacey's classroom was colorful and lively, filled with drawings like huge palm trees that she had made to simulate a tropical environment. There were also maps and samples of student work. On one side of the room there was a large (approx. 6 ft. long) open display case with several tiers of books for the students to read during SSR. They included a large selection of fiction, non-fiction, joke books, and periodicals.

Ms. Lacey's artistic talents were evident in her teaching. She directed the annual school drama production, she wrote poetry which she shared with her students, and she made elaborate classroom decorations. Yet, in spite of her obvious talents and the high

regard she enjoyed from her supervisors, Ms. Lacey did not seem to be a confident person. She was much more nervous about my filming her than were the other two participants, and she often apologized for the behavior of her students and the activities she planned even when they seemed appropriate to me. I tried to reduce her anxiety by arriving early for each observation to have time to chat informally with her. I also made it a point to compliment her on her strengths. Ms. Lacey was the only participant who did not have a masters degree in her field; that may have contributed to her low confidence. She knew I was casting her as an expert teacher in my study, but perhaps she did not feel like one.

Research Question 1: How does Ms. Lacey generate and sustain interest in reading?

Ms. Lacey prepared students to become interested in reading a novel by teaching them reading skills ahead of time, especially difficult vocabulary. She felt strongly that a teacher should not begin a story or writing activity without first preparing students with vocabulary instruction:

> Front-loading is a big belief that I've come to change in my teaching style throughout the years—introducing the vocabulary before they see it in the text. It works because when they're reading they don't stumble and it makes everything so great….I think in this country our big mission is to get kids to comprehend what they're reading, and to do that you have to go back and break reading down into smaller steps. And I think that starts with words and using them. (9/07/06 interview)

The idea that once obstacles to fluent reading are removed, and gaps in prior knowledge are filled, then interest will follow naturally was a conviction that seemed to underlie Ms. Lacey's view of interest building. She viewed interest as a goal in itself rather than just as a means toward motivating students to read.

One day, when Ms. Lacey announced to her students that they were going to start a unit on Shakespeare, she got a quick negative reaction from one student:

> Student: "I hate Shakespeare…."
>
> Ms. L: "Maybe that's because the vocabulary is a little tough. We're going to go over the vocabulary first so you can read Shakespeare easily. I know you're going to like it then. The stories are really great….Let's look at your worksheet that says "Important Drama Terms Before We Read." (5/10/06 lesson transcript)

After class she referred to the negative attitude of some students toward Shakespeare:

> You heard (student) complain when I said we were going to read Shakespeare but I know that's because they can't get through the strange language. If I can just get them to read enough to get into the plot I know they'll become interested and want to finish. But first I have to help them with the vocabulary. If I do it while we're reading a play then it will take away from flow of the story and the kids won't understand what's happening. (5/10/06 field notes)

Ms. Lacey also interested students in reading and writing by connecting the topics they were assigned to what was happening in their own lives. One afternoon, for example, when she had difficulty settling the class because some had been fighting at recess, Ms. Lacey directed the students to write about their emotions:

> Okay. I understand there was a little altercation during lunch but recess is over now. We've had enough discussion of it coming up the hall….If you feel like you have to talk and get some of your feeling out, you can write about it in Writer's Workshop right now instead of doing SSR. (5/10/06 lesson transcript)

Her own enthusiasm seemed to generate and sustain students' motivation for reading. I watched their faces from the side of the classroom while Ms. Lacey created situational interest for a folktale called "The Bamboo Beads:"

> "We're going to have fun with this story, guys. We're going to a tropical island in the Caribbean Sea, Trinidad. I would love to go there! How about you?" (M. Lacey asked them what a tropical island would look like, sound like, smell like, etc. The kids eagerly participated.) "Now look at the cover and tell me what it would be like there." (4/28/06 field notes)

Several students guessed at what it might be like in Trinidad, and Ms. Lacey fed their imaginations by having them close their eyes and visualize the surroundings as she described them. She also used a wall map to show them where Trinidad was located. Ms. Lacey dramatically described a tropical forest—bugs and birds sounds, etc.—using her voice and gestures to build suspense. The students' faces showed great interest; they seemed eager to get to the story.

Research Question 2: What are Ms. Lacey's beliefs about the role of interest in motivating students to read?

When I asked Ms. Lacey how she would define interest, she gave this explanation:

> I think it's that 'gotcha' response that happens when kids connect with a topic they like. Once you've 'got' them they enjoy whatever it is you want them to do…but then you've got to hold their interest so they keep learning. (5/10/06 interview).

Ms. Lacey understood that interest could be either situational or personal. It can be created momentarily by the teacher—"Once you've 'got' them"—or it can endure as a student's personal preference—"But some kids I can't get the interest out of yet. It's going to take a while. It's only the second week of school..." (9/07/06 interview)

Students in Ms. Lacey's class were seated in groups by mixed motivation levels. She believed that interest creates enthusiasm for literacy activities and that highly motivated students can help to generate interest in others.

> I think it takes some leaders in the class to show others that it's okay to be a reader….so I put a table with kids who are unmotivated with a leader who is motivated. (9/07/06 interview)

When I asked her how she determined students' motivation levels, Ms. Lacey explained: "I can tell by how much they enjoy reading and whether they get distracted or not while they're reading and by how many books they read" (9/07/06 interview).

Research Question 3: What perceptions does Ms. Lacey have about the instructional discourses and practices that foster students' interest in reading?

Ms. Lacey perceived that having knowledge about her students was critical for fostering interest in reading. In September, Ms. Lacey had her students fill out an interest

inventory form and she talked with them about what they liked to do. When I asked her what she did with that information, Ms. Lacey explained:

> I try to match books to them….Like there's one boy in here, Karl (pseudonym), who doesn't like anything except boats, so I got him a book called *Oyster Moon*, which is based on the Chesapeake Bay and boats and it's a mystery. He's reading it and he's enjoying it. (9/07/06 interview)

Ms. Lacey described similar connections she make to students' personal lives in motivating them to write:

> I try to get their interest by telling them that writing is just thinking on paper. You write about your own thoughts and your own experiences….I have a little mantra we say before every writing period: If we can think it, we can say it; if we can say it, we can write it. I always have them say that before they start to write. (9/07/06 interview)

In describing her perceptions of what kind of teaching interests students in reading, Ms. Lacey used the words "flexible" and "enthusiastic:"

> I have to be flexible because I have levels ranging from grade two up to grade nine in one room. I try to monitor the pace with those lower kids of mine and the top kids of mine, so I'd say my style is flexible, and enthusiastic. I'd say that you have to be enthusiastic to get kids interested in reading. (6/01/06 interview)

Her flexible teaching style was characterized by quick pacing. Every 15 to 20 minutes Ms. Lacey changed activities from silent reading to oral reading to writing to discussions to projects. "When I plan, I'm pacing in 20 minute intervals. Some kids are

so distractible, as you can see. They can't stay in their seats" (9/07/06 interview). Her students seemed comfortable with Ms. Lacey's pacing.

In the same interview, Ms. Lacey mentioned other pre-reading strategies that are effective in getting students to enjoy reading: predicting, finding main ideas, and fluency. Teaching these reading strategies was the long-range preparations she believed would help students develop the literacy skills that would then enable them to maintain interest in reading and writing.

Although Sustained Silent Reading (SSR) was required in her district, Ms. Lacey did not seem convinced that it was an effective instructional practice. I asked her whether she thought SSR motivated students to read different kinds of books or to read more books on their own.

> I don't know whether they do more reading on their own—at home—but they are happy to have time at the beginning of class to read whatever they want. I try to introduce them to good books from time to time so they don't read just fluff, but it's their choice….I also try to get them to make each other interested in the things they like to read. That's why I have them share. (9/07/06 interview)

The students did not seem eager to share what they were reading with the whole class. However, I often heard them recommending books to one another when they were making their selections at the classroom book display: "Students gather at book shelves to pick SSR's—one boy says he can't find anything good. Two other boys point out books they liked. He takes one of them to his desk" (4/28/06 field notes).

When I asked Ms. Lacey during a member check session what she perceived the main benefit of SSR to be for students, she responded: "It helps them settle down when they come in wild from recess" (9/07/06 interview).

Summary

Ms. Johnson created a home-like environment in which her students felt comfortable asking questions and making mistakes without fear of ridicule. She thought of herself as a mother figure who sees to all the needs of her children. Ms. Johnson used interest as a "hook" to get students to read or write. She believed that if she could only "whet their whistles" by creating situational interest in texts then students would be motivated to read more on their own. First of all, she would learn all she could about her students so she could make stories relate to their lives; secondly, she would carefully plan how to meet their individual learning needs; and thirdly, she would teach them the literacy skills necessary to enjoy reading and writing. She called this threefold process in interest building, "front-loading," because it was how she prepared students to enjoy reading.

Ms. Lacey wanted a very upbeat, friendly atmosphere in her classroom and she created one by her enthusiasm and creativity. She thought of interest as that "gotcha" response that happens when kids connect with topics they enjoy. For this reason, Ms. Lacey encouraged students to choose reading materials that interested them. She also believed strongly in spending plenty of time preparing students for reading texts by teaching them the vocabulary and concepts they would need in order to read fluently and

understand what they read. In her mind, this type of "frontloading" was the first step in building situational interest, especially for difficult texts.

Ms. Michaels' main goal was to make literacy activities enjoyable for her students. She created a non-threatening atmosphere by showing genuine concern for each of them and encouraging them to show respect for one another. Ms. Michaels spent a good deal of time preparing students for each new text. She felt that in order to get them interested in reading, she needed to help her students understand the setting, time period, and culture portrayed in the book. They also needed to learn reading strategies like how to predict what might happen in a story. Throughout the days her class spent reading and discussing a novel, Ms. Michaels, frequently used games to help students review events in the story and to sustain their interest in the plot.

Chapter V: Cross-Case Results and Discussion

After analyzing my data for each participant, I scrutinized the data again across cases looking for similarities and differences in the participants' beliefs and teaching behaviors. I also searched for themes, patterns, and constructs that might bring order to my data. I discovered a significant theme: Interest as a worthy goal in itself. It describes the teachers' belief that interest is a conduit to life-long learning and explains their persistent focus on developing personal interest rather than situational interest. I also discovered the important construct of "front-loading," a term describing the belief of all three participants that in order to engender personal interest, teachers must first do the following: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

In this chapter I report the findings that emerged from my cross-case analysis. First, I provide details about the theme and construct I found, then I present my results in comparing the frequency with which coded behaviors appeared in the data.

Theme: Interest As a Worthy Goal in Itself

"Interest should be thought of not only as an independent factor in the process of learning, but also as a desired outcome" (Schiefele, 1991, p. 318). In the interviews I held with the teachers in my study, it became clear to me that they thought of interest as a worthwhile goal in itself, not just as a means to an end. Like Schiefele, they understood that interest has a powerful effect on the quality of learning, so they worked to create

interest in books and interest in various forms of writing. They spoke of the enjoyment their own interest in reading and writing gave them and how they hoped to pass on that enjoyment to their students:

Ms. Johnson: "I encourage them to just embrace reading and embrace learning. I think that the enthusiasm that I have towards reading whatever it is kind of spills over; it has to. If you are in my room, it better!" (6/12/06 interview).

Ms. Michaels: "I think the teacher has to enjoy it [reading] and have some kind of passion for it too because that reflects in the teaching…and the kids pick up on that" (6/13/06 interview).

Ms. Lacey: "I write a lot of poetry and I share with them some of my poems" (6/01/06 interview).

Zahorik (1996) questioned 65 non-expert elementary and secondary teachers in his graduate education class, and found that they identified the generating of student interest as one of the most important elements of good teaching; however, they viewed interest as a means toward getting students to participate in learning activities rather than as a worthwhile goal in itself. Zahorik also learned that, unfortunately, the hands-on activities these non-experts used to create interest were not always related to the instructional objectives of a lesson.

This lack of connection between teachers' understandings about the concept of interest and their practical knowledge of effective ways to develop interest in their students was not evident among the three expert teachers in my study. When my participants talked about how they generated interest in literacy, they did not dwell on techniques for creating situational interest. They did not view it as a single task like a

hands-on activity; instead, they considered interest building as a concerted effort in skill building, competence building, and motivating that needs to be customized for each student. "I want my kids to enjoy reading because they know they can do it and because they have interesting books to read" (Ms. Johnson: 9/26/06 interview). "Once you've 'got' them [situational interest] they enjoy whatever it is you want them to do…but then you've got to hold their interest so they keep learning [personal interest]…that involves lots of scaffolding for some students" (Ms. Lacey, 5/10/06 interview).

Construct: "Front-loading"

"Front-loading" is a term used by two of the participants to explain the belief shared by all three; namely, that in order to engender personal interest, teachers must first do the following: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

Safe Classroom Environment

In the classroom, interest is an affect that occurs in the interaction between a student and an activity operating within a social context. Considering the social context of today's public school classroom, Brophy (2004) stated the importance of meeting students' fundamental needs. For motivational strategies to be effective, a necessary precondition is "an environment in which students feel comfortable, valued, and secure" (p. 27). The participants in my study strongly believed that students must first feel personally secure in a classroom in order to develop personal interests in literacy activities. This belief expressed by the construct, front-loading, surfaced in my

interviews with the three participants when I asked them how they created interest for reading:

Ms. Johnson: "I have to make the environment and the climate one that is welcoming to them" (6/06/06 interview). Ms. Johnson, felt that being well-organized, firm, and fair was her method of achieving a safe classroom environment in which students could enjoy reading and writing. She made it quite clear to her students that "You are all special to me," and "We're going to be respectful of one another" (5/17/06 observation).

Ms. Michaels: "I try to create a non-threatening atmosphere where kids can have fun learning and not worry about being made fun of" (6/13/06 interview). Ms. Michaels' reminders to her students about behaving well were worded in terms of respect: "We want to be really respectful of the people around you. Not only do we not talk, but we don't tap our fingers or tap our pencils like that because we might distract someone sitting next to you who's really trying to focus" (5/25/06 observation).

Ms. Lacey: "My classroom environment is very upbeat, very friendly, non-threatening." Ms. Lacey explained that she didn't believe in threatening students. "I try to listen to their reasons and tell them that even if I have to punish them I still care for them….How are they going to learn anything if they're afraid that the teacher or the kids are going to make fun of them?"(6/01/06 interview)

The three participants returned to the theme of creating a classroom haven when they described their efforts to reach struggling readers and when they talked about using cooperative learning. In the September observations I heard the teachers reminding students repeatedly about showing respect by not ridiculing others when they were

reading aloud or answering questions. Ms. Johnson summed up the reasons why creating a safe environment is important: "Learning cannot take place unless the kids are comfortable and they feel that it is a non-threatening kind of environment….All this happens in these few weeks [in September] and we talk and we get to know one another and that kind of sets the tone for the year" (9/26/06).

Connections to Student Lives

The construct, frontloading, also meant to the participants that they must build connections from the curriculum to the lives of their students so students could see value in what they were learning. Schiefele (1991) described two intrinsically motivating components within the specific area of individual interest, a feeling-related valence and a value-related valence. Individuals might feel great enjoyment and involvement when studying a particular topic or object, or they might value such an object or a subject matter because it has high personal meaning for them.

The three expert teachers were aware that in order to create personal meanings in literacy activities they needed to know their students well. For this reason, they built into their weekly classroom schedules opportunities for students to share their personal experiences and interests. The teachers used this information to construct connections between the curriculum and the lives of their students. In this way they sparked the interests of students in reading and writing activities.

Ms. Johnson believed that a teacher should try to create relevance in her teaching by connecting literacy activities "to the real world, real life, things you need to know, things that will help you be successful" (5/17/06 interview). She would sometimes talk to her students as if she were an employer telling them what would help them get a raise.

Ms. Michaels used the knowledge she accumulated about her students in planning activities that would create individual interest by building on their personal experiences, for example, when she held a pancake breakfast like the breakfast in the novel they were reading. Her purpose was to create interest in the novel for a student who was usually hungry in the morning because he would come to school late and miss breakfast. Ms. Lacey hand-picked books for her struggling readers based on surveys of their individual interests; and she encouraged students to pick topics about their own experiences for writing workshops, for example, how they might solve their personal problems.

Instructional Scaffolding

Ms. Lacey and Ms. Johnson used the term front-loading as they spoke of the planning they did for their language arts classes:

> Ms. Johnson: You have to front-load it. You can't just take a text and you can't just teach the kids with the text. You can't do it because there's so many different ability levels, so many different learning styles, and so many different interests. So what you have to do is try to find that common ground, you know. (6/12/06 interview).
>
> Ms. Lacey: Front-loading is a big belief that I've come to change in my teaching style throughout the years—introducing the vocabulary before they see it in the text. It works because when they're reading they don't stumble and it makes everything so great…. (9/07/06 interview)

Ms. Michaels did not use the term, "frontloading," in our discussions; however, it was clear that she shared the same conviction expressed by Ms. Johnson and Ms. Lacey

about the importance of providing instruction in reading skills to help students develop interest in reading. For example, Ms. Michaels believed that students needed to develop reading fluency in order to "get the flow of a story and enjoy it" (6/13/06 interview).

> I focus on fluency and occasionally I do independent fluency activities with them before we read a story. Fluency helps with their comprehension. If they are stopping every now and then to sound out words it takes away from a lot of good meaning and enjoyment they would get from the text. (6/13/06 interview)

All three teachers believed that the process of creating interest in reading or writing begins with a good deal of hard work in providing instruction and motivation up front, at the beginning of the school year, and up front, at the beginning of every instructional unit. To these experienced teachers, the rest of the process, finding imaginative ways to produce situational interest, was the easy part of teaching.

Front-loading as a motivational strategy included the gathering of knowledge about students in order to plan for their instruction. Much like the experts that Chi, Glaser, and Farr (1988) described, my participants spent a good deal of time qualitatively analyzing the learning problems of their students. The teachers believed that front-loading was a prerequisite for interest building because students would not be able to enjoy (i.e., become *interested* in) literacy activities if they were bogged down by difficult vocabulary, insufficient prior knowledge, or poor fluency skills. The experts learned as much as possible about their students in order to help them overcome such barriers to reading and writing.

Frequency of Teacher Behaviors and Characteristics

As I reviewed the categories that appeared most frequently in the data for each

participant, I identified those that were common to all three teachers. Also, I grouped together under the supraordinate category, *interest building,* those categories most related to the topic of my study: creating curiosity, creating relevance, creating suspense, and providing interesting texts. These are the categories of teacher behaviors and characteristics that were at the same time common to all participants and most frequently coded for each participant:

Interest building. Four categories can be grouped together under the heading of *interest building* because they are motivational behaviors directly concerned with engendering interest in reading and writing. I coded 91 combined instances of these four categories: creating curiosity, creating relevance, creating suspense, and providing interesting texts. Two or more of these behaviors were sometimes exhibited by a teacher in the same lesson, for example, when Ms. Michaels introduced a new novel:

> I love this book and I hope you guys love it too. Its such a good book *(providing interesting texts).* But before we get started, I want you to think about a few things….I'm going to pass out the book and what I want you to do is only look at the cover. Don't read the back yet; just look at the picture on the cover….*(creating curiosity).* Let's look at the boy sitting on the suitcase and describe what we see….Have any of you gone on a trip all by yourselves? *(creating relevance).* (Ms. Michaels, 4/19/06 lesson transcript)

Praise/Encouragement. Praise and encouragement were forms of recognition generously given to students, especially for effort. I coded 55 instances of this type of motivational behavior for the three teachers together. The examples of praise and encouragement that follow occurred in one lesson taught by Ms. Johnson: (Pseudonyms

are used for students)

"Bettina went very nicely from 'I, I, I,' to telling it about her sister. She's narrating it in third person. It really turned out well."

"Good job, Sven, I'm really proud of you."

"Thank you, Mike...way ahead of time. I'm really proud of you."

"I like the way Kara is doing it; she's encasing her words in a box. Good job."

"Now, I'm observing Max and I'm loving it. Max is getting the hang of it. He's identifying his words. He's just switching from one color to another. He's gone; he's practicing; he knows now. I'm almost getting the feeling that Max is feeling proud of the words he's using over and over again. Proud of them."

"I love what I see Antonia doing - taking some notes."

"I like the way this group is doing it."

"There's an awful lot that you've done with your research papers and I'm really proud of that--so proud of the papers you've done so far." (5/9/06 lesson transcript)

Scaffolding - Instructional scaffolding was continually offered, especially right before reading and writing activities. There were 53 instances of scaffolding in the data. For example, Ms. Lacey provided instructional support for her students in this manner:

> I'm going to give you a little background to this story. This story takes place in Trinidad, a small island in the Caribbean. Let's look at our map to find where that is (*geographical background*). (4/28/06 lesson transcript)
>
> There will be a few French words in this story. Maybe you already know some of them *(vocabulary instruction)*. (4/28/06 lesson transcript)
>
> What do you think it would feel like to be on a tropical island? *(guided imagery*)

(4/28/06 lesson transcript)

Knowledge of students. All three teachers understood the importance of knowing their students well in order to connect instruction to their interests. There were 51 instances in which they either displayed considerable knowledge about their students, sought to extend that knowledge, or expressed the importance of knowing their students in order to plan instruction. These examples are from Ms. Michaels' teaching:

> He is a very smart boy you know he's very social, half hour conversations, he likes to talk, likes to debate and I think when he saw that a book could really make you think and he could figure things out I think that's when he started to check out fiction books because before that he would check out a book on motorbikes or school stuff (*having knowledge about student*s). (7/13/06 interview)
>
> I'll give them all a chance to tell me what they did over the weekend have their moment in the spot light. You really do learn about their interests (*extending knowledge about students*). (7/13/06 interview)
>
> When I sit down and write my lesson plans, I think about who is in the class and what they need, and obviously I think about the objective and curriculum for that day and what we're trying to do. I think about how I'm going to get them interested and how I'm going to help them to enjoy it and how am I going to make it fun (*importance of knowing students in order to plan instruction*). (7/13/06 interview)

Table 3 lists alphabetically the 21 categories I used in coding my data and the frequencies with which they appeared in the data. Following Table 3 are definitions and examples for each category

Table 3

Code Frequencies from Field Notes and from Video and Audio Transcripts

Categories	Lacey	Michaels	Marsh	Total
1. analyzing probs. qualitatively	6	8	11	25
2. clear goals & expectations	5	19	16	40
3. cooperation encouraged	7	12	15	34
4. creating curiosity	5	10	7	22
5. creating relevance	7	7	8	22
6. creating suspense	4	16	15	35
7. engaging activities	6	16	10	32
8. enthusiasm for learning	11	10	10	31
9. extrinsic motivators	6	9	10	25
10.games/play/drama	5	13	5	23
11.knowledge of students	14	23	14	51
12.opportunistic planning	9	10	9	28
13.positive atmosphere	10	14	10	34
14.positive management	7	32	28	45
15.praise/encouragment	15	28	33	55
16.providing interesting texts	3	5	4	12
17.scaffolding	17	19	17	53
18.stimulates creative thought	5	7	5	17
19.stimulates deep thinking	6	7	8	21
20.stimulating environment	1	0	1	2
21.student choice	9	10	13	32

Data Code Definitions and Examples

1. Analyzes Problems Qualitatively

Definition: spends a good deal of time studying problems in depth, i.e., problems concerning student learning (Berliner, 1986; Chi, Glaser, & Farr, 1988)

Example: "I spend so much time trying to decide what doesn't work. I know what I'm suppose to teach but what if it doesn't work. What do I do to re-teach that? When should I re-teach it? What should I do to enhance those children who need to be enhanced? So the middle of the road is easy, that's a no-brainer. But what about the kids that didn't get it? It's kind of trial and error and you have to diagnose some. I spend so much time with that I don't worry about style." (Ms. Marsh, 5/17/06 interview)

2. Clear Goals and Expectations

Definition: makes clear to students what is to be learned in a lesson and why it is important; expects all students to learn basic content and skills (Dolezal, Welsh, Pressley, & Vincent, 2003)

Example: "I want to tell you the purpose of this and I hope you're going to enjoy this too. You're going to have something to read as an individual, and you're the only person in your group that's going to read that. You're responsible for that, for knowing everything in that section. Then I'm going to say 'get in with your number group.' At that point, all number ones will meet over here, and ones, by the way, will read the same thing, all twos will get over here and all twos will read the same thing. Now what do you think is the power in first reading something by yourself then second, getting into a group with people who have read the same thing?" (Ms. Marsh, 4/26/06 lesson transcript)

3. Cooperation Encouraged

Definition: creates opportunities for students to learn from one another (Dolezal et al., 2003)

Example: "At this point, you're going to allow a partner or peer in your group try to find a pattern that exists in your writing. For instance, if they look at your writing and see that you are using the same colors over and over again, and that color represents that you are shifting from first to second person constantly, then what might be the pattern that they reflect on for you? So, what I want you to do is start with three. Take a look at your partner's. Don't talk to them yet. See if you can figure out what common errors they are making, especially when it comes to shifting person." (Ms. Marsh, 5/09/06 lesson transcript)

4. Creating Curiosity

Definition: builds curiosity in students by hinting at what new stories will be about and asking students to predict what stories will be about; asks engaging questions that make students eager to begin a story in order to answer the questions (Brophy, 2004; Hidi & Harackiewicz, 2000; Ivy & Broaddus, 2001)

Example: "I'm going to pass out the book and what I want you to do is only look at the cover. There's a lot of interesting things on the cover of the book. Don't read the back yet; I'll give you a chance to do that later. Just look at the picture on the cover, then think about these statements we just did and see if you can predict what the book is going to be about." (Ms. Michaels, 4/19/06 lesson transcript)

5. Creating Relevance

Definition: selects texts that have characters or plots that students can relate to

(Brophy, 2004; Hidi & Harackiewicz, 2000; Ivy & Broaddus, 2001)

Example: "I sort of picked ones [novels] that I really enjoyed myself and then I thought about students and I thought that they probably would really enjoy them too and really sort of connect with or at least care about the characters." (Ms. Michaels, 9/08/06 interview)

6. Creating Suspense

Definition: creates excitement and anticipation regarding the outcome of story plots ((Brophy, 2004; Hidi & Harackiewicz, 2000; Ivy & Broaddus, 2001)

Example: "I would pick a book and I'd leave the ending off to tempt them….Or I'll start reading a book and I'll stop at a particular point and it just drives them absolutely nuts" (Ms. Marsh, 6/12/06 interview)

7. Engaging Activities

Definition: plans learning activities and tasks that engage the minds and imaginations of students (Dolezal et. al, 2003; Guthrie & Wigfield, 1999)

Example: "I know with *The Diary of Anne Frank* I'd turn off the lights and I would pretend that beneath the floor are a group of people that if they knew we were here they would call the police and we could go to concentration camps. I'd put the shades down and I would ask them to imagine that they couldn't make a move and if they did somebody would tell on them and I asked one student to pretend that he had to go to the bathroom what would you do? And I watch the kids take off their shoes and tip toe across the floor--just kind of the drama of it all. And then once I lead them to a certain point I'll say, 'Can you imagine that that really happened, that there was a group of

people who lived on edge for 2 years, dah dah dah.' And the kids are going 'What? No way! I couldn't do that.' So I think that initial whetting of the whistle, getting them involved in it, makes them want to read." (Ms. Marsh, 6/12/06 interview)

8. Enthusiasm for Learning

Definition: models excitement about story plots, student achievement, or her own learning (Brophy, 2004; Wharton-McDonald, Pressley, & Hampston, 1998))

Example: "I think that the enthusiasm that you have towards whatever it is kind of spills over; it has too. If you are in my room, it better!" (Ms. Marsh, 6/12/06 interview)

9. Extrinsic Motivators

Definition: uses rewards, not as bribes, but as acknowledgement of achievement or good behavior (Dolezal et al., 2003)

Example: "This could be worth some chips today, I think. I'm looking for a group that can figure it out quickly and all hands are up. I think this is a red chip item. Would you agree?" (Ms. Marsh, 6/12/06 interview)

10. Games, Play, Drama

Definition: uses fun activities to reinforce learning (Dolezal et al., 2003)

*Example: "*Our review today is going to be sort of like a game." (Ms. Michaels, 5/16/06 lesson transcript)

11. Knowledge of Students

Definition: knows a great deal about the home lives and interests of students; is sensitive to the psychology of adolescents (Berliner, 1986)

Example: "I go to performances. I go to football games. I've got Bubba who just invited me October 14th to the talent show at the high school at 7:00 pm. The boy can sing. And I'm up there, 'Go, Bubba! Go!' So, I think it's what you do in the hall too. It's what you do when you go to their performances if you have time, and it makes them know that you care. Do you know what I mean?" (Ms. Marsh, 9/26/06 interview)

12. Opportunistic Planning

Definition: quickly solves problems and makes adjustments in instruction as needs arise; flexible in adapting lesson plans to take advantage of "teachable moments" (Berliner, 1986; Block, Oakar, & Hurt, 2002)

Example: "I think I go from the gut. I do a lot of teaching based on the feel I have for the kids--depends on the kids, the kind of class. The activities sometimes are teachable moments. Having had such a long career in teaching I'm able to shift gears very quickly and that is a good thing I think." (Ms. Marsh, 5/17/06 interview)

13. Positive Atmosphere

Definition: creates a safe, caring, enjoyable atmosphere in the classroom; uses humor to put students at ease (Brophy, 2004; Dolezal et al., 2003)

Example: "This room is like my home and everybody that comes into it is welcome and I have to make the environment and the climate one that is welcoming to them and that includes the way I present the lesson because I see my job as a big picture. I want to make the students who are visiting my home comfortable, you see." (Ms. Marsh, 5/17/06 interview)

14. Positive Management

Definition: reinforces good behavior; explains the need for good behavior in positive terms; does not threaten with punishments (Dolezal et al., 2003)

Example: "Now, if I might have your attention, please. Thank you, so much. Thank you for not talking. Thank you for focusing on Ms. Marsh. Thank you for not fooling with your chairs." (Ms. Marsh, 5/09/06 lesson transcript)

15. Praise/Encouragement

Definition: gives recognition for effort as well as for accomplishments (Dolezal et al., 2003)

Example: "Now, I'm observing Mike [pseudonym] and I'm loving it. Mike is getting the hang of it. He's identifying his words; he's just switching from one color to another; he's gone; he's practicing; he knows now. I'm almost getting the feeling that Mike is feeling proud of the words he's using over and over again. Proud of them." (Ms. Marsh, 5/09/06 lesson transcript)

16. Providing Interesting Texts

Definition: selects texts that are well written, with topics that appeal to adolescents, and with vivid language (Brophy, 2004; Hidi &Harackiewicz, 2000; Ivy & Broaddus, 2001)

Example: "I sort of picked ones [novels] that I really enjoyed myself when I read them and then I thought about students and I thought that they probably would really enjoy them too and really sort of connect with or at least care about the characters. They were well written. They were written in a good flow, a good sort of easy to follow along

like you kept wanting to read to find out what was going to happen." (Ms. Michaels, 9/08/06 interview)

17. Scaffolding

Definition: provides background and strategy instruction before, during, and after reading (Dolezal et al. 2003)

Example: "I think it happened in my lower group. I've read out loud to them and they, after a period of time, get the gist of what the story is about and they don't care. They want to get in there and read it. You'll see them with the dictionary beside them." (Ms. Marsh, 6/12/06 interview)

18. Stimulates Creative Thought

Definition: encourages original thinking and expression (Dolezal et al. 2003)

Example:" Now, this chapter didn't have a lot happening, so your summary part can be short, but your reactions can be long--your thoughts and feelings. I'm sure you can have lots of reactions to write about." (Ms. Michaels, 5/01/06 lesson transcript)

19. Stimulates Deep Thinking

Definition: challenges students by asking questions and structuring tasks that require higher order thinking (Block, Oakar, & Hurt, 2002; Dolezal et al., 2003)

Example: "I'm going to ask you to read it silently and in a moment when we come back together, I'm going to ask you to come up with a formula that could probably say all those things that are discussed in numbers 3-6. I want you to think about how you could explain [all the information]." (Ms. Marsh: 5/17/06 lesson transcript)

20. Stimulating Environment

Definition: keeps classroom walls colorfully decorated with materials that reinforce learning of curriculum topics; displays student work (Brophy, 2004; Dolezal et al., 2003)

*Example: "…*On the right-hand wall there's a huge paper palm tree Ms. Lacey made to simulate a tropical environment for the Trinidad story" (5/03/06 field notes)

21. Student Choice

Definition: gives students opportunities to self-select materials, study mates, activities, assignments (Dolezal et al., 2003)

Example: "Here's what I want you to do. If you're sitting with someone you're comfortable with that's fine. I need you to sit in groups of four, so if you're sitting by yourself you need to find a group." (Ms. Marsh, 4/26/06 lesson transcript)

Summary

I anticipated at the outset of my field work that I would find commonalities in the participants' knowledge regarding the importance of interest in student learning and in their pedagogical knowledge regarding how to create and sustain interest within a daily lesson and a larger curriculum unit and, indeed, I did find that they shared such common understandings. However, I did not foresee that they would share a much broader pedagogical schema containing as a starting point the building of student competency, and as an end point the creating of personal interest. These parameters are reflected in the results I obtained from my data analysis: The theme of interest as a worthy goal in itself;" and, the construct, "front-loading," as a strong belief of the participants that in order to engender personal interest, teachers must first do the following: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

Chapter VI: General Discussion and Conclusion

The problem addressed in this research study is the lack of knowledge among many secondary teachers about how to create learning environments that foster motivation for reading, especially interest in reading. I addressed this problem by producing detailed descriptions of expert reading instruction that might serve as models for secondary teachers wishing to improve their motivational skills.

I chose as my methodological approach a qualitative multi-case study of three middle school language arts teachers who were nominated by their supervisors as expert literacy teachers. I observed each teacher once a week for a half day from mid-April through the end of the school year and two days in September of the following school year. I video taped all the lessons I observed—20 class periods for each teacher--and audio taped the three semi-structured interviews I held with each teacher. These recordings, together with my notes and the artifacts I collected, were the sources of my data.

Limitations of Study

The use of a reputational case selection method to identify expert teachers was a limitation of this study necessitated by my need to gain access to teachers' classrooms. Ideally a researcher would use more objective criteria than recommendations from supervisors. To compensate for this limitation, I tried to triangulate my participant selections by involving the principals, the language arts supervisors, and the assistant superintendents of instruction in making recommendations. These are the persons who, I

believe, are most often in the position to observe and evaluate teachers. The schools involved in my study did not have reading specialists on their staffs or I would have asked them as well to nominate teachers .

What resulted from my using a reputational case selection method was the inclusion of a subject, Ms. Lacey, who fell short of measuring up to my estimation of an expert teacher, not as a motivator, but as a classroom manager. On occasion, Ms. Lacey struggled to control her students' behavior and get them on task at the beginning of a lesson. I attributed this, in part, to the fact that the students often were coming to her class excited from outdoor recess. Nevertheless, I could easily imagine either Ms. Michaels or Ms. Johnson managing these situations more successfully.

The small number of participants and the relatively short time period for observations might be considered limitations; however, they suited the limited scope of this investigation—only middle school language arts teachers—and the methodology I chose—a qualitative multi-case study. The fact that I needed to conduct my study at the end of the school year to accommodate the schools' testing schedules was offset, I believe, by my data collection during the following September. I was able to observe how the three participants motivated their students at the beginning of a school year as well as at the end.

Discussion of Findings

In analyzing my data on the beliefs of the three participants regarding how they interested adolescents in literacy, I discovered a significant theme: Interest as a worthy goal in itself. It describes the teachers' belief that interest is a conduit to life-long

learning, and explains their persistent focus on developing personal interest rather than situational interest. I also discovered the important construct of "front-loading," which was a term used by two of the participants to explain the belief shared by all three; namely, that in order to engender personal interest, teachers must first do the following: (a) establish a safe classroom environment; (b) build connections from the curriculum to students' lives; and (c) provide instructional scaffolding.

The theme, interest as a worthy goal in itself, reveals a distinguishing characteristic of my subjects; they aimed at cultivating long-lasting personal interest rather than creating short-term situational interest. I have often used the metaphor of "a spark" to describe interest even though it describes only situational interest. Creating "sparks" is a prevailing concern of the novice teachers I train. They tend to concentrate on what to say or do or illustrate at the beginning of a lesson to capture the spontaneous interest of students. This was not, however, the main concern of the three participants in my research study. Although they were adept at generating situational interest, their main goal was not to create "sparks" but rather to gather enough "firewood" through long-range planning and strategy instruction to sustain students' *personal* interest in reading and writing.

This result is consistent with the findings in expertise research that Chi, Glaser, and Farr (1988) summarized: "Experts see and represent a problem in their domain at a deeper (more principled) level than novices; novices tend to represent a problem at a superficial level" (p. xviii). The results that Dolezal et al. (2003) obtained in their study of how nine third-grade teachers motivated their students also seem to indicate that focusing on generating personal interest is, in fact, a sign of pedagogical expertise. The

low-engaging and highly engaging teachers Dolezal et al. studied had similar amounts of experience; however, the low-engaging teachers spent a great deal of time on easy games and exercises aimed at creating situational interest with very little effort on learning about and cultivating students' personal interests as did the highly engaging teachers.

The construct, "front-loading," speaks of the long-range preparations that the three participants believed were necessary for cultivating student motivation. Ms. Johnson, Ms. Lacey and Ms. Michaels, spoke with conviction about the importance of first creating a safe, caring environment that nurtures student interest in learning. A similar connection of interest to the social context of the classroom was made by Deci (1992). He described interest as an affect that occurs in the interaction between a person and an activity operating within a social context. "When people engage in activities within a social context that allows satisfaction of their fundamental psychological needs for competence, autonomy, and relatedness, they will be likely to maintain or develop enduring interests in those activities" (Deci, p. 52). Positive relationships (relatedness) to teachers and other students help to create a safe classroom environment.

This belief on the part of the teachers is consistent with the findings of Wentzel (1997) in her three-year study of middle school students. Those students reported that their engagement in classroom activities was affected by whether their teachers appeared to be caring, fair, and concerned with the general well-being of students. The students also responded that when teachers made a special effort to make classes interesting, this showed they cared for their students.

This idea of a safe classroom environment as a necessary prerequisite for building interest has practical implications for teacher education programs. Preservice teachers

should be encouraged to learn from the example of expert teachers to broaden their efforts at motivating student from just planning interesting lessons to creating larger, personal classroom contexts necessary for student motivation. My three participants spent the first weeks of the school year creating an environment of emotional support that would enable students to engage in literacy activities.

The construct, frontloading, also meant to the participants that they must build connections from the curriculum to the lives of their students so students could see personal value in what they were learning. Schiefele (1991) described two intrinsically motivating components within the specific area of individual interest, a feeling-related valence and a value-related valence. Individuals might feel great enjoyment and involvement when studying a particular topic or object, or they might value such an object or a subject matter because it has high personal meaning for them.

The three expert teachers were aware that in order to create personal meanings in literacy activities they needed to know their students well. For this reason, they built into their weekly classroom schedules opportunities for students to share their personal experiences and interests. The teachers used this information to construct connections between the curriculum and the lives of their students. In this way they sparked the interests of students in reading and writing activities.

Ms. Johnson believed that a teacher should try to create relevance for her students by connecting literacy activities "to the real world, real life, things you need to know, things that will help you be successful" (5/17/06 interview). She would sometimes talk to her students as if she were an employer telling them what would help them get a raise. Ms. Michaels used the knowledge she accumulated about her students in planning

activities that would create individual interest by building on their personal experiences, for example, when she held a pancake breakfast for her class like the breakfast in the novel they were reading. Her purpose was to create interest in the novel for a student who was usually hungry in the morning because he would come to school late and miss breakfast. Ms. Lacey hand-picked books for her struggling readers based on the surveys she took on their individual interests; and she encouraged students to pick topics about their own experiences for writing workshops.

The participants skillfully used these teaching strategies geared toward creating situational interest, especially for engaging unmotivated students who lacked interest in academic activities. At the same time, teachers could distinguish between interventions that can trigger situational interest and interventions like strategy instruction that promote more enduring personal interests. Their concept of front-loading included the whole-group and individualized instructional scaffolding that they provided for their students before literacy activities in order to eliminate barriers to learning. Ms. Johnson and Ms. Lacey actually used the term front-loading to describe this strategy instruction, Ms. Michaels did not; nevertheless, her teaching practices demonstrated the same attention that the other two teachers gave to scaffolding for building interest in reading and writing.

All three participants believed that instructional scaffolding would increase students' perceived competence by helping them read with greater fluency and understanding and, therefore, greater enjoyment. Wigfield and Eccles (2000) described a possible causal relationship between competence beliefs and interest. They discovered through their research with elementary students that a directional causality was apparent

over time from competence-related beliefs to interest. They suggested that teachers should focus initially on competence beliefs when working with children with motivational problems.

My teacher-experts functioned much like the experts whom Chi, Glaser, and Farr (1988) described as spending a good deal of time analyzing challenges qualitatively, trying to understand what was best for each student. They understood that perceived competence and interest are critical factors in motivation for learning (Wigfield et al. 1997), so they planned up-front instruction in reading and writing strategies before beginning literacy activities. "I want my kids to enjoy reading because they know they can do it" (Ms. Johnson, 9/26/06 interview).

Front-loading emotional and instructional support for students could be explained alternatively as common sense pedagogy that all teachers use--teaching literacy skills, developing classroom communities, and making literacy activities relevant to students' lives, before literacy activities. However, ordinary teachers would not likely see this form of competency building as being connected to building student interest as did my expert teachers.

Similar differences in understanding between expert teachers and non-expert teachers arose in a study by Sabers, Cushing, and Berliner (1991) when they questioned teachers with varying degrees of experience. All their teacher subjects appeared to be concerned about building student interest; yet, the novices saw this as a matter of managing student behavior while experts thought of creating student interest as a matter of giving attention to the total classroom environment.

Future Research

In planning how to develop individual interests in their students, Ms. Lacey, Ms. Johnson, and Ms. Michaels placed great value in learning all they could about their students, especially in knowing students' family backgrounds, personal interests, learning styles, and prior knowledge. This finding suggests that future studies on creating interest in reading and writing should include ways of assessing the extent of teachers' knowledge about their students and how the quality of that knowledge affects student interest. To date, most studies have centered on assessing teachers' content knowledge or pedagogical knowledge or a combination of the two (e.g., Berliner, 1986; Shulman, 1987). Supervisors of teachers, especially of beginning teachers, could benefit from such research by learning the usefulness of evaluating the degree of knowledge that teachers have about their students. This criterion in not found in most assessments of teacher performance.

One important aspect of teachers' knowledge about students that I would like to explore in my future research is the level of awareness expert teachers have about cultural influences on students' interest in reading and how this awareness might translate into culturally sensitive literacy instruction. The cultural diversity in today's public school classrooms poses a unique challenge for teachers and raises the question of whether accomplished teachers can really be considered expert if they fail to tap into a student's culture to create motivation for reading?

Developing pedagogical expertise, of course, takes many years of practice (Huberman, 1985), and it is not an automatic outcome of years of experience (Berliner, 1986). This reality gives rise to other questions for future research on pedagogical

expertise: Can skill in developing student motivation for reading be acquired in teacher training programs and honed into expertise in professional development programs; or, does it take a teacher who is caring *by nature* to create a caring environment for children, and a teacher who *naturally* loves reading to create interest in reading? Certainly these are traits of all good teachers. However, the features that might distinguish an expert literacy teacher from an ordinary one are how effectively she communicates her care for students and how much she relishes reading.

Conclusion

My study, modest as it was due to practical considerations regarding the number of participants involved and the time period for data collection, did not aim to produce formal theory regarding the generation of reading motivation in young adolescents. Nevertheless, the development of grounded theory is a cumulative process to which many beginning researchers like me can contribute through our high-level descriptions (Strauss & Corbin, 1998). My purpose was to produce high-level descriptions of expert reading instruction that might serve as models for middle school teachers wishing to improve their motivational skills. I believe I have accomplished that purpose and, hopefully, have made a significant contribution to the field of reading research.

Appendix A: Summary of Pilot Study

In preparation for my dissertation research I conducted a three-week pilot study in one of the schools where I did my research project. A seventh-grade teacher in her third year of teaching was selected by her principal for this exploratory study as an example of a highly effective literacy teacher. I videotaped one of her reading/language arts classes every day, transcribed all dialog between her and her students, and had the teacher check the accuracy of my transcriptions. As a participant observer, I talked with students before and after class and took detailed field notes throughout the lessons. During silent reading periods, I reread my notes and attempted to code teaching behaviors that have been identified by other researchers as cultivating student motivation for reading (Guthrie & Wigfield, 1999; Pressley et al., 2001). There were several examples of motivating instruction: offering choices, encouraging peer interactions, appropriate praise for effort, etc.

Only when I interviewed the teacher after the observation period did I realize that she had not yet reflected upon nor internalized her teaching goals to the point where she could create her own lessons. In interviewing her about her beliefs and practices regarding creating interest in reading I found that she was more eager to discuss the district's policies and curricula and to compare her practices with those of other teachers in her school. This was probably because she was relatively inexperienced and had not yet developed the unique pedagogical knowledge and confidence that usually come with several years of experience (Berliner, 1986).

The young teacher in my pilot study described her method of building student interest to be a matter of establishing proper routines and instructional techniques rather than creating a classroom environment based on supportive teacher/student interactions and student/student interactions (Morrow, Tracey, Woo, & Pressley, 1999). I have revised my interview questions so that in the future I can spend more time discussing with my subject her efforts in creating a classroom climate that nurtures a love of reading (Block, Oakar, & Hurt, 2002). This will likely be a productive line of questioning when my subject is a veteran teacher.

I obtained parental permission to videotape the class for three weeks and to interview a group of five student volunteers. I interviewed them during the first part of their lunch time so as not to take up their recess. The questions I used were based on a survey by Ivey and Broaddus (2001) on what makes students want to read in middle school classrooms. In particular, I wanted to learn what it was about the conduct of the class or behaviors of the teacher that made them interested in reading.

The students were eager to participate in the group interview, but at times my questions needed to be rephrased in order for them to understand what it was I wanted them to discuss; I learned that my questions needed to be more focused. Also, my questions did not tap the students' opinions about the teacher's effectiveness as a motivator, so I revised them for future use to include items on students' perceptions of teacher expectations and effective teaching strategies.

The artifacts available for my pilot were limited because this was the first year the teacher had taught seventh grade and she was using mostly teaching manuals and materials developed by other teachers. Few samples of student work were available

because the teacher had been directing instruction toward preparation for standardized testing.

The results of my pilot study confirm Berliner's (1986) conclusion that building student interest must be added to the long list of other teaching skills that can only be acquired through years of training and teaching experience. I also learned that I need to become more active as a participant observer in order to minimize reactive behaviors on the part of the teacher and students caused by my presence.

Appendix B: Teacher Interview Questions

First Interview:

- How did you decide to become a teacher?
- Tell me about your training to become a teacher and the grades and subjects you've taught.
- What were some of the most powerful influences on shaping the kind of teacher you are today?
- How would you describe your classroom environment?
- How would you describe your teaching style?
- How would you characterize your behavior management techniques?

Second Interview:

- What are your beliefs about how reading should be taught to middle school students?
- What literacy strategies do you think are most important for your students to learn?
- How do you motivate students to read?
- How would you define interest?
- How do you cultivate students' personal interests?
- Tell me about one of your students who has grown in his/her interest in reading this year?

Third Interview:

- What attitudes toward reading do students usually come to you with in September?

- What are your goals for your students?
- How do you connect what you do in your classroom to students' lives outside of school?
- What characteristics of a text do you find create interest in students?
- How do you make decisions about seating arrangements, grouping, time allocations?

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