LITERACY PROGRAM ADOPTION AND TEACHER CHANGE:

UNDERSTANDING THE CONDITIONS THAT PROMOTE TEACHER INVESTMENT IN AN INSTRUCTIONAL MANDATE

A Capstone Project

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by

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Abstract

In an effort to reverse an ongoing trend of stagnant literacy proficiency rates for students, federal and state governments have developed laws to codify approaches for literacy instruction based on The Science of Reading, including The Virginia Literacy Act (Bechtold et al., n.d.). School divisions, such as Mountain Valley Public Schools (MVPS), a medium-sized Central Virginia public school system, were required by this act to adopt approved literacy resources aligned to this research (*Virginia Literacy Act | Virginia Department of Education*, n.d.). The MVPS School Board adopted *HMH Into Reading* as their primary English Language Arts instructional resource, although teacher use of their prior reading resource was scattered and inconsistent. A neighboring public-school division, Ridgetop Public Schools (RPS), had been utilizing the HMH program for several years, and employed teachers who successfully changed their literacy instructional practices to align with the requirements within HMH. Through a descriptive case study, I interviewed three of these teachers and three RPS literacy change leaders, and conducted document analyses, to identify themes that I then used to form recommendations for the MVPS roll-out. Findings suggested that supportive conditions that ultimately contributed to program implementation included: 1) addressing the substantial breadth of the program's requirements, 2) clearly communicating program expectations through coaching and training, and 3) providing opportunities for teacher agency. These findings informed recommendations that support the MVPS adoption of the *HMH Into Reading* program.

Keywords: teacher change, reading program adoption, literacy instruction, qualitative methods

DEDICATION

To my grandmother, Marjorie Kennard.

Our family's original educator,

Who taught me the value of reading,

And to not eat with my elbows on the table.

She always wanted a doctor in the family,

(I hope that this counts).

Thank you for helping me realize that school was for me.

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Chapter 1: Introduction

Context of the Problem

Learning how to read has long been a fundamental driver of public education (Schlechty, 1990). From European Protestant schools in the New World, to Horace Mann's Common Schools, the core purpose of schooling began with teaching reading and writing as a means of having students access the knowledge needed to be moral, functional, and contributing citizens of our republic (De Castell & Luke, 1983; Schlechty, 1990). Nearly 200 years later, the importance of quality literacy instruction for our students has not diminished. In 2024, the United States Department of Education established or renewed nine nationwide literacy programs aimed at promoting literacy instruction beginning at birth (*Early Learning: About Early Learning,* 2024). Despite a continued prioritization of literacy instruction in our public schools since their origin, the reading proficiency outcomes for our nation's learners remain troubling (NAEP Report Card: Reading, 2024).

Nationally, student performance in reading, as measured by The National Assessment of Education Progress (NAEP) test, showed that just 31% of fourth grade students were identified as proficient or higher in reading in the 2024 test administration (NAEP Report Card: Reading, 2024). The public schools within The Commonwealth of Virginia performed near this national average in reading, with 32% of fourth grade students performing at or above the "proficient" level (see Table 1.1). Fourth graders in Virginia saw the biggest decline in the nation (a 10% reduction from their pre-pandemic performance) with NAEP reading proficiency between the 2000 and 2024 administrations. Both nationally and in Virginia, proficiency rates were even

lower for Black students, Students with Disabilities, and students learning English. These results suggest that, despite literacy instruction remaining a consistent priority for America's schools, improvement in literacy instruction is necessary to fulfill this fundamental goal of public schooling.

Table 1.1

2024 Statewide NAEP Grade 4 Reading Performance

Student Group	Virginia Proficiency	Nation Proficiency
All Students	32%	31%
American Indian	-	14%
Asian	64%	53%
Black	16%	17%
Econ. Disadv.	18%	19%
English Learners	5%	8%
Hispanic	16%	21%
Multiple Races	39%	35%
Students w Disabilities	10%	10%
White	38%	39%

- = not enough data for report.

(NAEP Report Card: Reading, 2024)

The lifelong impact of low levels of literacy cannot be overstated. According to the World Literacy Foundation, the inability to read or write costs the global economy $1.19 trillion annually and yields higher local levels of "poverty, unemployment, long-term illness, dependence on welfare, social exclusion and crime" (Lal, 2015, p. 663). In the United States, the

economic cost of illiteracy was calculated in 2023 to be $300 billion annually. Adults who are not literate have higher rates of intergenerational transmission of illiteracy and expose their children to fewer words than those of literate parents (10 million versus 33 million) (Abadzi, 2003; Beder, 1999). This lack of vocabulary exposure has been found to foster generationally repeated reading struggles, 72% of children of parents with low literacy levels never become proficient readers (Regis College, 2023). Similarly, according to the Children's Reading Foundation, students who exit kindergarten as below level readers will have just a 12% chance of attending college twelve years later (*Learning Literacy Glossary*, 2018).

As noted in Table 1.1, levels of reading competency in the United States are not equitably distributed across demographic groups. The significantly lower levels of literacy proficiency among Black students today echo the outcomes of the purposeful prohibition of literacy instruction for Black persons dating back to the 1600s (Sandles, 2023). The consequences of lower literacy levels certainly compound and contribute to the social justice and equity imbalances plaguing students of color (Baker-Bell, 2020). Although accountability for the education of individual membership groups of students is now a required core condition of state school accountability systems, the persistent existence of achievement gaps suggests that educational equity, especially in terms of literacy, has still not been realized (Darling-Hammond, 2004; Singleton, 2014).

The United States Government, whether it be legislatively (e.g., 2002 No Child Left Behind Act, 2015 Every Student Succeeds Act) or through US Department of Education mandates, has employed various systems of accountability to clearly measure and hold states to

national standards aimed at improving these outcomes (Eden, 2017). Under both pieces of aforementioned federal legislation, states developed independent accountability systems for student progress that aligned with the law (Portz & Beauchamp, 2022). Despite these efforts, student reading proficiency rates are at their lowest levels since 1990 (Long-Term Trends in Reading and Mathematics Achievement, 2022). Current approaches in teaching reading are not meeting the needs of America's students, and states are looking at new ways to meet federal requirements while improving their schools (Petscher et al., 2020).

Educational researchers have long identified teaching approaches, now often related to emerging cognitive science findings, which show the potential to improve outcomes for all students (Perry et al., 2021). There has been a notable lag, however, in these pedagogical approaches finding their way into classrooms (Seidenberg et al., 2020). Although there are a variety of factors influencing what materials and pedagogical approaches eventually end up in our nation's classrooms, one lagging indicator is clear: instructional approaches appear to be difficult to change (Anderson et al., 2018; Penlington, 2008).

Perhaps this research-to-practice gap is nowhere more obvious than within the area of literacy instruction. The now ubiquitous term, "Science of Reading," describing literacy instruction built on an interdisciplinary body of scientifically-based research including cognitive psychology, linguistics and implementation science, is built upon research findings initially published in the 1980's--yet these approaches are just recently finding their way into the nation's classrooms (Seidenberg et al., 2020). One plausible reason for this lag could be the curricula that school systems require their teachers to utilize each day.

Studies have shown that the curricular materials provided to educators do not necessarily align with the instructional approaches that teachers may be asked by school leaders to employ (Valencia et al., 2006). According to Seidenberg et al. (2020), publishers need to "appeal to a broad market" (p. 122) and lesson planning therefore often results in teachers drawing from resources that may be broadly relevant to a large market but misaligned with instructional approaches and learning standards that teachers may be required to focus on by their school systems. As a result, teachers have been shown to supplement, or augment, required resources with unvetted materials to match the instructional expectations within their schools. In addition to the availability of resources aligned with specific pedagogical approaches, the literature suggests that educational publishers do not necessarily lead the way in applying new education research in their materials—they instead wait for the market to demand it (Valencia et al., 2006).

Studies have noted the role that publishers play in educational change and program choices from as early as the 1980's, when Lorimer (1984) concluded that the "domination of the market by a homogeneous group of publishers and the parallel tenets of multinational business and contemporary pedagogy…have been responsible for considerable influence" (p. 357). This same phenomenon of publishers driving instructional practices based on their perceptions of the market's needs has been documented more recently by numerous researchers, suggesting that this pattern still exists today and requires scrutiny among school divisions when evaluating programs for adoption (Seidenberg et al., 2020; Watt, 2007).

In an effort to break this pattern and improve literacy outcomes for all membership groups of students, states have begun to enact requirements aimed at accelerating research-

backed instructional change with literacy instruction in our classrooms (Pedaste et al., 2015). In Virginia, the passage of the Virginia Literacy Act (VLA), aims to do just that. The VLA was codified during both the 2022 and 2023 General Assembly legislative sessions, and includes requirements of local school boards to develop division-level literacy plans, provide reading intervention services through 8th grade, and create individual reading plans for students who are performing below grade level (Bechtold et al., 2024; *Virginia Literacy Act*, n.d.).

A key requirement of the VLA literacy plan requirement is the delivery of core literacy instruction that is, "…based in scientifically based reading research and evidence-based literacy instruction" (*Virginia Literacy Act*, n.d., p. 4). To that end, the VLA requires divisions to adopt literacy programs from publishers that have been vetted by the Virginia Department of Education (VDOE) to meet strict requirements based on science of reading research. Publishers were required to submit their materials to the VDOE staff for a comprehensive review in 2023, and seven approved core instructional programs, including Houghton Mifflin Harcourt, *HMH Into Reading Virginia* (HMH), were ultimately approved based on their alignment with science of reading research standards (*Virginia Literacy Act*, n.d.).

Researchers have found curricular materials may indeed drive teachers' pedagogical behavior (Garet et al., 2001; Little, 1989; Stern et al., 1989). Historically, changes in the literacy and mathematical programs adopted by schools and school divisions have not only impacted the methods teachers have used to instruct, but often the content taught as well (Desimone, 2009). As such, Virginia officials considered the adoption of appropriate instructional resources as a

paramount requirement of the VLA and gave school divisions an aggressive turnaround time to get programs adopted and implemented (Bechtold et al., 2024).

School systems in Virginia were given until the 2024-2025 school year to replace their curricular materials (if their current materials were not already on the approved list) with new resources (*Virginia Literacy Act*, n.d.). To comply with the VLA, Mountain Valley Public Schools (MVPS) (pseudonym), a medium-sized school division in Central Virginia, selected HMH as their reading program in Spring 2024 for full implementation in Fall of 2024.

Problem of Practice

Reading data in MVPS (prior to the adoption of HMH) suggested that the phenomenon seen with low levels of national and state level reading proficiency is also prevalent there. Although NAEP data is not disaggregated to the school division level, annual Standards of Learning (SOL) assessments for students at MVPS revealed that 27% of this school system's fourth graders did not meet the Virginia's English Reading proficiency standards. Although this 73% pass rate may appear, on its surface, to indicate higher student reading performance, the pass rates for the Virginia SOL are based on a different measure than the NAEP. For NAEP, proficiency rates for Virginia 4th graders were 37% lower than state SOL pass rates. To illustrate, in 2021 NAEP scores indicated that 31% of 4th grade students state-wide were proficient readers, while SOL scores indicated 68% of students passed. Given the national reach of NAEP, researchers have found that actual rates of literacy are lower than the pass rates published by Virginia school divisions, suggesting that student performance in this area remains low for MVPS (Ji et al., 2021). Moreover, the SOL pass rate was significantly lower for traditionally

marginalized groups in MVPS, including Black students (33%) and Hispanic Students (47%) (see Table 1.2). The required SOL pass rate for school accreditation in Virginia is 75% for each of these membership groups.

Table 1.2

2023 Grade 4 English Mountain Valley Public Schools SOL Reading Performance

Student Subgroup	Advanced	Proficient	Passed	Failed
All Students	23%	39%	62%	38%
Female	23%	40%	63%	37%
Male	23%	38%	60%	40%
Asian	<	<	<	<
Black	7%	27%	33%	67%
Hispanic	9%	38%	47%	53%
White	36%	45%	82%	18%
Multiple Races	36%	27%	64%	36%
Students with Disabilities	7%	29%	36%	64%
Students without Disabilities	25%	41%	66%	34%
Economically Disadvantaged	6%	28%	34%	66%
Not Econ. Disadvantaged	40%	50%	90%	10%
English Learners	-	15%	15%	85%

(*Mountain Valley Public Schools Quality Profile*, 2023)

< = not enough data

Prior to the adoption of HMH, teachers in MVPS utilized a literacy program for their sole curricular resource entitled *Being a Reader* (BAR) (Y. Billingham[1], personal communication, July 2024). This program, originally adopted by the school division in 2018, was not approved by the Virginia Board of Education in 2023 as part of the VLA materials review, despite the

publisher's proclamation that, "…The BAR program includes instruction for each of the components that the Science of Reading approach identifies as necessary for skilled reading to develop" (*How Does Being a Reader Align to the Science of Reading?*, 2023, p. 1). Virginia's Department of Education analysis found that the BAR resource failed to effectively align with evidenced-based reading practices in both phonics and comprehension instruction, two key components of effective literacy instruction (*Intervention Instructional Program Guide & Supplemental Instructional Program Guide | Virginia Department of Education*, n.d.; Shanahan, 2020).

The shift from BAR and adoption of HMH, however, may not guarantee a change in classroom instruction. Teacher compliance with BAR was described as 'scattered' and 'inconsistent' by members of the instruction department at MVPS, and teachers were noted as applying reading strategies that they learned from colleagues or teacher education programs instead of those included in the adopted curricular resources (S. Swanson[2], personal communication, July 8, 2024). Additionally, it was noted by division leaders that teachers often relied on below-level reading materials and low-rigor student tasks in response to students who were reading below level (S. Swanson, personal communication, July 8, 2024; Y. Billingham, personal communication, July 2, 2024). Due to this established history of implementation concerns prior to the HMH adoption, school division leaders concluded that the adoption of HMH would require the use of effective professional development, resource allocation, and supportive structures to break the existing instructional approaches in schools and realize instructional change (S. Swanson, personal communication, July 8, 2024; Y. Billingham,

personal communication, July 2, 2024). It is notable, however, that no division-wide audit or representative study was undertaken by MVPS to systematically explore BAR implementation or teacher supplements to BAR. It could be that teachers chose evidence-based reading strategies independent from BAR in an effort to improve their literacy outcomes, which could, perhaps, result in less of an eventual adjustment to the HMH.

Change within educational institutions can be classified as gradual (evolutionary) or abrupt (revolutionary) (Lewis & Steinmo, 2012). Although literacy instruction in America's schools has evolved over time, most notably with the more recent research into the cognitive processes studied under the science of reading umbrella, the compulsory and immediate adoption of this new reading program by MVPS is, indeed, revolutionary (Gersick, 2020; Hindman et al., 2020; Petscher et al., 2020). Challenges associated with this type of rapid change may include the perception by teachers of the loss of any pre-existing effective approaches through the implementation of new process, and the disequilibrium experienced by institutions as changes are implemented (Gersick, 2020).

In an effort to meet the goals of the VLA (and improve student reading outcomes) while also addressing the concerns regarding a sudden change in practice, members of the school division's instructional leadership team have developed a comprehensive on-boarding and professional development program to familiarize teachers with HMH, as well as the theoretical basis for its design (Y. Billingham, personal communication, July 2, 2024). Because researchers have found teachers' instructional behaviors as traditionally difficult to change (often related to a variety of contextual factors), it is important that the goals and metrics associated with this

program adoption are supported with carefully planned professional development and supportive structures (Fullan, 2010; Hofman et al., 2012). It is notable, however, that MVPS was not the first school district in Central Virginia to embark on this journey, and there is potential to increase the likelihood for this adoption's success by applying promising practices learned from those who have already made a shift to HMH and are seeing improved literacy outcomes.

Purpose of the Study

It is evident that significant changes in literacy instruction must be made in order for student reading outcomes, especially among traditionally marginalized groups, to improve at MVPS. School division staff find themselves at a turning point with literacy instruction, and the possibility for significantly impactful change is on the horizon (Y. Billingham, personal communication, July 2, 2024). A series of decisions regarding teacher professional development and HMH implementation expectations will likely determine the success of this change (S. Swanson, personal communication, July 8, 2024).

The purpose of this study was to investigate what conditions contributed to the successful implementation of the HMH resource with teachers deemed successful at implementing the HMH program for literacy instruction at another Virginia school division, Ridgetop Public Schools (RPS). Although MVPS is in year one of the implementation of HMH, RPS has been using this program for more than five years, with elementary teachers who have been recognized for its successful implementation. If MVPS leadership intends to leverage the state-approved resources within HMH to improve their literacy instruction, then lessons learned from the RPS implementation may provide valuable information that they can leverage.

My research considered the division-level and school-level decisions and approaches that supported the development of three identified successful HMH implementers (teachers) in RPS through the use of this new literacy instruction program. Specifically, I aimed to answer the following research questions:

1. What lessons can be learned for Mountain Valley Public School's literacy instruction by studying one other school division's successful HMH implementers?

    1a: What do the successful HMH implementers perceive as the key conditions that affected their investment in the literacy program?

    1b: What conditions, after the initial program implementation, do successful HMH implementers and division staff believe led to the ongoing use of this resource and continued improvement in their teachers' classrooms?

    1c: What teacher perceptions of this program, do participants believe, were impacted during the implementation process, and do they believe that those perceptions changed over the course of implementation?

Theoretical Framework

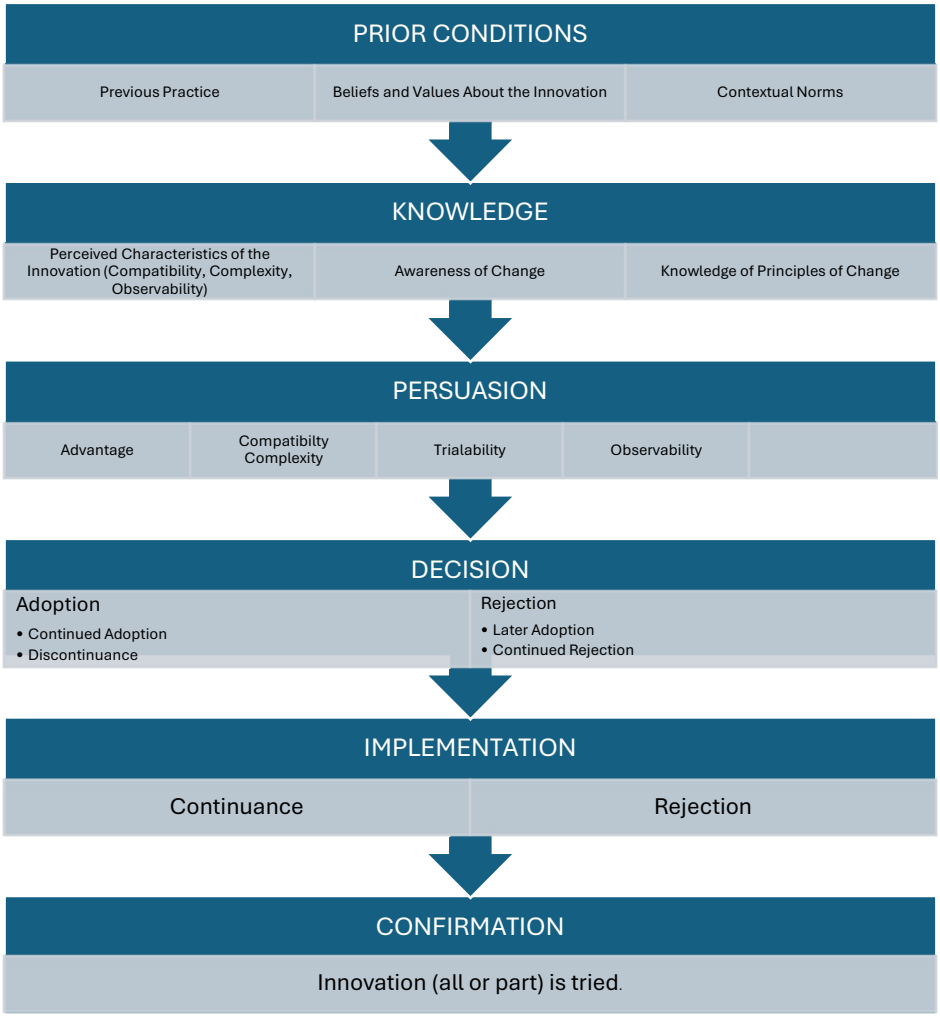
This paper examines effective practices in a large-scale literacy program adoption within a neighboring central Virginia school district to inform and support literacy instruction at MVPS. However, it also examines the forces that impact the implementation and continuance of instructional change for teachers, specifically, the forces that support or inhibit implementation of the change.

Research has repeatedly shown that teachers want to improve instructional outcomes for their students and are willing to change their behavior if they believe what they are being asked to do will help their students find success (Newberry & Hinchcliff, 2023). When instructional change is asked of teachers that is aligned with the daily classroom realities a teacher faces, it is much more likely to take hold (Blank & Alas, 2009; Cordingley, 2015; Desimone, 2009; Dunst et al., 2015; Rousseau & Tijoriwala, 1999; Wei et al., 2009). Fullan et al. (2006) refers to this phenomenon as 'personalization' and 'precision,' when the proposed changes in pedagogy are directly aligned to both the learning needs of students and instructional realities for educators.

To effectively capture these contextual factors that impact teachers' decisions to change their instructional approach, the theoretical framework for this study (see Figure 1.1), based on Rogers' Diffusion Process by Innovation Model (also called Rogers' Model of the Innovation-Decision Process), considers the prior conditions, knowledge of the change, persuasive factors of the change, initial decision and final implementation decisions that teachers experience (Henderson, 2005). The framework is particularly relevant in educational change because it captures the ever-present impact of norms and existing practices, along with the conditions that impact the likelihood of adoption, rejection, later adoption, or later rejection in a school setting (Rogers et al., 2014).

Figure 1.1

Theoretical Framework



Adapted from Rogers' Diffusion Process by Innovation, based on Henderson (2005)

As noted by Talke and Heidenreich (2014), potential adopters of an innovation, such as teachers implementing a new reading program, offer resistance based on their initial judgements regarding its attributes in relation to the context they operate in. The more closely the innovation is situated within the discipline-specific context educators work in each day, the more the

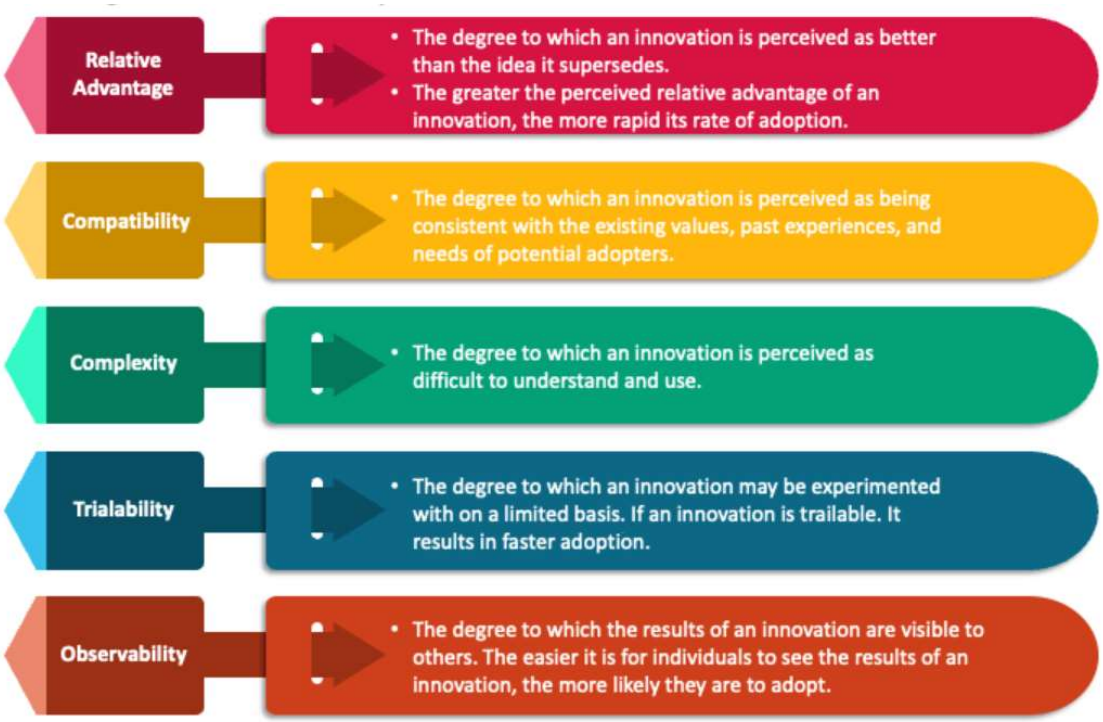
likelihood that those individuals will collectively create a critical mass of acceptance of said change (Burnes & Jackson, 2011).

The concept of teacher resistance to change is extremely nuanced and has been found to actually contribute to the overall health of the institution--likely due to the possible negative results associated with jumping from innovation to innovation (Solorzano & Bernal, 2001). Rogers' Diffusion Process by Innovation captures the impact of these contextual realities that may cause this resistance, while also isolating the persuasive factors and decision points that will directly impact the adoption of the innovation.

As articulated by this theory, in order for the literacy program adoption in MVPS to have confirmed and continual use, teachers must see the innovation as relevant and appropriate to their context, consider the innovation as appropriately complex with measurable (observable) outcomes, and realize ongoing indicators of success at key points in its implementation (Cordingley, 2015; Henderson, 2005; Rogers et al., 2014). Rogers' stage of *Persuasion*, which focuses on the factors considered by potential adopters prior to an innovation's first use, is especially applicable to this study. As teachers consider the relative worth of an instructional mandate, they must weigh several legitimate factors in comparison to the burden of the impact. These factors (see Figure 1.2) may be influenced through the methods in which the innovation is presented and supported.

Figure 1.2

Rogers' Notion of Persuasion



Copied from (*Diffusion of Innovation Theory*, 2024)

Regardless of how the innovation being asked of educators may be viewed by teachers, this theoretical framework allows this researcher to isolate the key conditions and decision points affecting an innovation's potential adoption. Within the boundaries of this study, my research into those contextual factors that contributed to the successful implementation within RPS, including the decisions within Rogers' Diffusion Process stages, will inform the MVPS innovation adoption and support its long-term success.

Significance of Study

If the desired change in literacy instruction is to happen for divisions like MVPS, then effective decisions made regarding the HMH roll-out are essential. Divisions can potentially learn from one another to inform their decision making. The benefits of collaboration among teachers are well-documented (Hipp & Weber, 2008; Vescio et al., 2008). These benefits may include increased staff morale, increased student achievement and improved building climate (Hipp & Weber, 2008). Educators across the nation have regularly created formal models of collaboration, including the use of Professional Learning Communities (PLC) and Instructional Rounds, to reap these benefits (Levine & Marcus, 2007). Research has shown the benefits of collaboration between teachers since at least the 1980's, when a large-scale statistical analysis revealed that collaboration was a "strong predictor of achievement gains in reading and math" (Thompson et al., 2004).

Interestingly, this same level of collaboration is not often seen between school divisions even as they tackle similar challenges, such as implementing the Virginia Literacy Act (Doyle & Locke, 2014; Simieou et al., 2010). According to discussions with MVPS leadership, engagement with surrounding divisions who have implemented HMH has not been part of the implementation planning process (S. Swanson, personal communication, July 8, 2024). This parallel isolation inhibits the potential benefits of learning from one another and decreases the likelihood of a more effective response to those challenges. It has been said that change in education is the only constant, and as accountability measures are put into place to improve

outcomes for our most marginalized membership groups, there lies immense potential in exploring what conditions in other school divisions were successful (Atkinson et al., 2007).

As noted in Table 1.2, MVPS has significant achievement deficits that are ripe for improvement. The implications of effective literacy instruction are enormous. Research-based literacy instruction of high quality can reduce gaps in early literacy achievement, especially for traditionally marginalized students (Bean & Dagen, 2011; Chance, 2010; Chaney, 2014; Comber, 2014). As MVPS staff implement the HMH resource, this study will potentially provide valuable recommendations based on successful HMH teachers. This may inform future decision-making for MVPS leaders to improve fidelity with the use of the new resource and therefore improve literacy outcomes for students.

Key Terms and Definitions

Elementary Literacy Instruction: Literacy is defined by the National Center on Improving Literacy as, "The ability to read and write well" (2024). More specifically, this term includes instructional approaches that promote speaking listening, reading and writing as integrated communication processes that are applicable in various contexts and under various conditions (Langer, 1986; Teale & Yokota, 2000).

Curriculum and Programs: The definition of the term "curriculum" has been debated in education literature since at least the 1960s (Kliebard, 1989). The Virginia Department of Education (VDOE) uses the broad working definition as "[The] plans for the learning experiences through which all children acquire knowledge, skills, abilities, and understanding"

(*Early Childhood Curriculum | Virginia Department of Education*, n.d.). In terms of application, the VDOE maintains list of "VDOE-Approved Curriculum" for various subject areas (*Early Childhood Curriculum | Virginia Department of Education*, n.d.). Although VDOE uses the notion of learning goals and experiences interchangeably with curriculum, other states and authors refer to the skills, abilities and understandings to be taught in schools as "curriculum," and the adopted resources to support that instruction as "programs" (Bol et al., 2022). For my purposes in this study, I will refer to publisher resources as "programs" and learning standards and goals as "curriculum."

Pedagogy: Mead and Doecke (2020), refer to pedagogy as, "…a driver of the ongoing production of knowledge domains, as well as ruling modes of learning" (p.2). More succinctly, pedagogy is known as the method in which new learning is imparted on others (Hinchliffe, 2000). In the school setting, this term could be summarized as the art of teaching—the approaches used to ensure student understanding of new content.

Professional Development: Researchers disagree on the exact definition of this term, as it is seen as a broad term that encompasses all aspects of teacher learning (Sales et al., 2011). We will consider professional learning to be "formalized training to develop teachers' existing knowledge and practices to enhance student outcomes and school quality" (Sancar et al., 2021, p. 2). A 2021 research publication found that teachers spend an average of 10.5 days per year engaged in professional development (Sims & Fletcher-Wood, 2021). This is normally in the form of staff meetings, workshops, and off-site trainings by outside experts (Guskey & Yoon, 2009).

Science of Reading: Science of Reading is a broad term to include literacy instruction based on cognitive science research, focused on developing both word recognition and language comprehension through the understanding of how the brain processes written text. (Teaching Reading IS Rocket Science: What Expert Teachers of Reading Should Know and Be Able to Do, 1999). The Scarborough Reading Rope (Figure 1.2) is often used to illustrate the independent yet interdependent processes that an effective reader must master. It is an often-referenced diagram in evidenced-based literacy instruction, as it captures the complexities of mastery required to be a proficient reader (Shanahan, 2020). The two strands of the rope (Language Comprehension and Word Recognition), and their proportional relationship, are often illustrated by a diagram called The Simple View of Reading (Figure 1.4). This diagram mathematically represents the requirement of proficiency in both areas needed for readers to comprehend text.

Figure 1.3

Scarborough's Reading Rope

Copied from International Dyslexia Association (2018)

Figure 1.4

The Simple View of Reading

Copied from The Ohio Department of Education and Workforce (2023)

Professional Learning Community (PLC): School team members who regularly meet to plan toward continued improvement in meeting learner needs through a shared curricular-focused vision (Hord, 1997). PLCs normally include: a shared vision and values, shared and supportive leadership, collective learning application to practice, shared personal practice (e.g. peer observation), and supportive conditions (Hord, 1997, 1998, 2008). PLCs have been found to increase student achievement through shared capacity among members to better meet the needs of students (Huffman & Jacobson, 2003; Jessup, 2022; Olivier & Hipp, 2010).

Chapter Summary

Mountain Valley Public Schools (MVPS) is implementing an urgent large-scale instructional change in elementary literacy instruction through the adoption of a new program (*HMH Into Reading*) as a requirement of the VLA (Bechtold et al., 2024). Researchers have found that instructional change is often slow and inconsistent, requiring significant resources and teacher buy-in for long-term success (Blank & Alas, 2009; Cordingley, 2015; Newberry & Hinchcliff, 2023; Talke & Heidenreich, 2014). My research aimed to study teachers deemed successful in their implementation of HMH in RPS to identify key conditions that led to their

successful use of this program. This information is used to inform the MVPS adoption process with recommendations created from the data gathered in this study to increase the likelihood of successful change in literacy instruction in adherence with the VLA, and, ultimately, improve literacy outcomes for students.

Chapter 2: Literature Review

The purpose of this study was to investigate the conditions that contributed to the successful implementation of a literacy initiative in a different school division for the purpose of applying these lessons to MVPS' implementation. Therefore, I focused my literature review on empirical studies where researchers examined the factors found to be most influential in teacher pedagogical change. In support of my overarching research question, "What lessons can be learned for Mountain Valley Public School's literacy instruction by studying one other school division's successful HMH implementers," I considered literature that was grounded in a similar context (teacher pedagogy) with the premise that the relevance of these studies could inform the data I collected in my capstone research.

In this chapter, I begin by establishing the scope of educational change I aimed to study and then review research to establish which conditions are most likely to impact teacher pedagogical change. I then discuss the literature base focused on each of those factors, and I examine the similarities and differences in those researchers' findings. In the final portion of this review, I offer research perspectives around sustaining and evaluating change initiatives, with consideration around the conditions necessary for impactful change to be realized over time.

The primary theory undergirding this work was Rogers' Innovation-Decision Process (Figure 1.1). Rogers contends that the conditions in which teachers work, and their knowledge of the proposed change's impact on their practice within their context, are heavily influential factors in the adoption or rejection of the change (Barrett et al., 2020). The literature I review in this

chapter illuminates the conditions seen as influential in Rogers' theory that may impact adoption or rejection.

In an effort to consider research related to my research question, I primarily considered peer-reviewed literature available through EBSCO, ERIC (ProQuest), JSTOR, and APA PsycINFO. Although my goal was to consider relevant research within the last 10 years, I also critically analyzed literature that was older due to its seminal nature or specificity regarding the concept of teacher change. I utilized keywords (e.g., "pedagogical change," "teacher change adoption," "education innovation," "education change process"), adjacency searching, and Boolean logic to ensure that I was able to consider high-quality studies without excluding relevant findings.

The Impetus for Change

The changing of teachers' instructional approaches may be voluntary or mandatory and may happen quickly or slowly. A compulsory change, such as the mandatory adoption of a new reading resource, may be received differently by teachers than an optional training might, however, the research contrasting the two types of change is limited. For the purposes of this literature review, my focus is on a time-bound, compulsory change, which is aligned with the context of MVPS' instructional change. I acknowledge that voluntary change is a daily function of an effective teacher—trying new approaches and resources, monitoring student responses, and adjusting instructional approaches are part of the craft of teaching. For example, in a collaborative, longitudinal study of the impacts of staff development on reading instruction for 4th, 5th and 6th grade teachers, Richardson (1994) found that teachers were constantly making

small voluntary changes to their instruction, such as the micro adjustment a teacher may make when an approach works for one small reading group and not another. This mixed-methods study included structured interviews, classroom observations, ethnographic observations as well as analysis of student reading comprehension performance. The researchers concluded that there were significant improvements in student performance among teachers who continually made such instructional changes, and they were able to verify those changes through direct observation.

A widely studied example of a rapid instructional innovation occurred out of necessity during the COVID-19 pandemic, where 94% of the world's students faced school closures that required alternative approaches to instruction to be instituted, including remote learning (Bojović et al., 2020; Pokhrel & Chhetri, 2021). The use of remote learning technologies, the bulk of which were designed for use at the college level or the business world, required extensive teacher training in the use of the technological platforms (i.e.: Zoom, Canvas, Schoology, Google Classroom, etc.) (Chakraborty & Maity, 2020). Similarly, most teachers also entered remote learning with little practice in the pedagogical approaches effective in engaging learners remotely (Chakraborty & Maity, 2020). Prior to the Covid-19 pandemic, Kennedy and Archambault (2012) conducted a large-scale survey of recent education graduates from schools that were members of the American Association of Colleges for Teacher Education focused on recent teacher graduates' preparation for online teaching methods. The researchers found that just 1.3% of the 522 respondents had any preparation in online instruction. Their findings now serve

as another indicator that teacher education program graduates, like much of the world, would not be prepared for this rapid large-scale change.

In 2020, with their qualitative study on experiences of parents with children during the pandemic, Garbe et al. found that the lack of preparation for remote learning was largely considered a failure (for both teachers and families). The change, compelled by the requirement of schools to enact a rapid instructional modality shift to online learning, resulted in a lack of student engagement and stalled learning outcomes within their study site. Through open-ended surveys of 122 families of students who were previously attending brick and mortar public schools that shifted to online learning, the researchers found that, despite high satisfaction with teacher support (88%) and access to required technology (95%), parents reported student engagement and motivation as their primary school-based concern after their own difficulty balancing work and child supervision. Respondents identified “non-positive" learner motivation, accessibility for students with special needs, and learning outcomes as the biggest challenges with this shift. Although the necessary response to the pandemic left little choice about the speed of this innovation, it does offer a warning of the potential impacts of a pedagogical innovation without time for adequate training.

Factors that Influence Change

Researchers consistently find that teachers encounter a myriad of internal and external pressures that affect nearly all aspects of their jobs (Blanchard et al., 2016; Collie, 2014; Leithwood & Jantzi, 2006; Talke & Heidenreich, 2014; Thoonen et al., 2011; Wright, 2020). When considering a change in classroom instruction, it is beneficial to the change agents to

consider the factors that shape teachers' levels of application or rejection of a change in pedagogical behavior. Given the sheer number of influences a teacher faces within their role, the literature base in the area of teaching conditions is vast (Cohen et al., 2018; Fullan, 2010; Locke et al., 2019; Merle et al., 2022). In an effort to identify key conditions affecting change, I focus this literature review on studies that specifically consider mandatory pedagogical and curricular changes in schools. Several patterns emerged in the literature base regarding potential change factors.

Leithwood and Kantzi (2006) analyzed data from a four-year evaluation of a literacy and mathematics instructional strategies initiative of over 2,000 teacher participants across 655 schools. The researchers used Likert-style surveys focused on instructional decision making and structures within the school for teachers, as well as analyzed student performance data over the evaluation window. The researchers found that teachers self-reported that their classroom approaches were most heavily influenced by the school leadership involved with the change, their own motivation and beliefs, and the availability of necessary resources.

In a qualitative study on teacher responses to an overhaul of learning standards at the high school level, Jenkins (2020) identified similar factors being influential in teachers' instructional behavior changing to incorporate the new standards. For this study, the author used a descriptive case study spanning over three years, beginning with initial structured participant interviews and then follow-up annual interviews (utilizing the same protocol) for the next two years. Data were analyzed by the researchers using a constant comparative method, where responses were categorized for further analysis. Jenkins collected data from all participants

(n=12) for the entire length of that study and determined there were four major factors that were most influential in the adoption of the desired curricular change.

The first area noted by Jenkins was the necessary presence of an effective school leader supporting the change, which she defined as either a formal school leader (e.g., principal or dean), or a teacher leader. Jenkins also found that appropriate resource allocation (including adequate time for training and preparation) indicated increased adoption success. Her findings also noted that teacher agency, or the ability for teachers to influence aspects of the curricular change process, improved teacher responses to the studied change. Finally, Jenkins found that the inclination for teachers to collaborate or collectively problem solve as they experimented with and became familiar with and implemented the instructional changes studied increased rates of adoption of the new standards.

Mandated changes in teacher practice, such as those studied by Jenkins (2020), are typically initiated through required professional development (PD) commissioned by schools or divisions (Sims & Fletcher-Wood, 2021). Sims et al. (2021) defines PD as "a structured, facilitated activity for teachers intended to increase their teaching ability" (p. 7). In a 2016 research study focused on teacher working conditions, Sellen (2016) analyzed survey data from 100,000 elementary teachers and found that they spent an average of 10.5 days per year engaging in PD, defined as "courses, workshops, conferences, seminars, observation visits, or other in-service training" (p. 7). To better understand additional factors that may influence teacher change adoption, I expanded my literature search to include those factors that influence "successful"

professional development, defined by Desimone (2011) as resulting in the implementation of the desired change in teacher practice.

Sims et al. conducted a 2021 systematic review and meta-analysis on literature aiming, in part, to answer the research question, "What supports successful implementation of PD programs?" In this study, 'success' was defined as professional development that results in teachers embedding the PD approach in their actual instruction through "goal-directed behavior" (p. 11). Through the coding and analysis of 186 empirical studies in this area, the researchers isolated additional areas that contributed to teachers' use of the targeted professional development strategy (with related student achievement gains). These included some aforementioned factors (collaboration, teacher agency) but also yielded additional areas to include in this review including instructional coaching and lesson studies.

Instructional coaching, as defined by Joyce and Showers (1981), is "an observation and feedback cycle in an ongoing instructional situation" (p. 170). The term 'lesson study' is defined by Lewis et al. (2006) as "observation of live classroom lessons by a group of teachers who collect data on teaching and learning and collaboratively analyze it" (p.3). I discuss research published on both of these approaches later in this literature review, however, Sims et al. (2021) noted in their research that both of these approaches yielded effect sizes above .06, suggesting a positive relationship between these approaches and their definitions of successful outcomes. Both of these approaches, in addition to the aforementioned factors (Relevance to Daily Work, Resource Alignment to Proposed Innovation, Time, and Collaboration) are most often strategic decisions made by the leaders of a proposed change (Mei Kin et al., 2018), which I discuss next.

Change Leadership

Within the context of education, change leadership can take various forms. Heller and Firestone (1995) explored common change leadership positions at nine middle schools implementing a Social Problem Solving (SPS) curriculum and found that across the schools they studied, change leaders included three groups: principals, teachers, and school district administrators. The SPS program's implementation required teacher training on the new curriculum, and then regular instruction to students using the curriculum components in their classrooms. Teachers were also expected to guide students in the use of the learned content to solve social conflicts within their education spaces as they occurred. Through interviewing 42 principals and teachers with structured open-ended interviews over four months, the researchers found that the titles of the change leaders were not related to the implementation levels of the SPS program across classrooms as measured by classroom observations.

While the official titles or functional roles they may assume vary, the person who is leading the change effort has the potential to significantly impact outcomes. There is a substantial research base about the impact of school principals as change agents and the characteristics of the principals that impact their effectiveness as a change agent (Fullan, 2007, 2010; Hord & Hall, 1987; Retallick & Fink, 2002). In a 2018 research study that focused on principals' change leadership competencies and the resulting teacher attitudes towards a change, Mei Kin et al. (2018) conducted a quantitative study examining teacher change beliefs (their capacity or willingness to adopt a change) as measured by close-ended surveys. The researchers compared teacher perceptions of their principals' competencies in goal framing, capacity

building, diffusing resisting, and institutionalizing to each teacher's change belief survey responses and found a high level of positive correlation between the two measures. In other words, when principals' competencies were higher in these specific areas, teachers indicated more confidence in trying the desired instructional change. The data they studied represented the responses of a sample pool of 795 secondary school teachers.

When principal leadership is ineffective or absent, teacher leadership may effectively fill the void. In the earlier-reviewed study by Heller and Firestone (1995), within two of the nine research sites where the social problem-solving (SPS) curriculum was adopted, the primary change leader for each site shifted from the principal to the teacher leader. In one case, the researchers noted that the principal became overburdened by other aspects of his job and purposefully transferred the program's oversite to a teacher leader who then successfully led the change initiative (as measured by participant interviews). In another case, the principal displayed "ineffective" leadership skills or a "lack of interest" in the program, and a teacher informally became the building expert and effective change agent for the curriculum. Both schools showed high levels of program adoption.

Regardless of who is leading the change, the potential impact of a change agent on a school community can be significant (Leithwood & Jantzi, 2006). Waters et al. (2003) conducted a meta-analysis that included empirical studies on leadership over the past 30 years. After analyzing 70 studies from as far back as 1970 that involved a total of 2,894 schools and 14,000 teachers, the researchers found that there was a substantial relationship between teachers' perceptions of leadership and student achievement (.25 effect size). To put this effect size in

perspective, the authors found that student achievement between an "average" change leader and an "above average" change leader varies by ten percentile points on standardized reading and math tests. The researchers used teacher survey responses to questions about their perceptions of principal competency within 21 identified leadership domains (e.g., Knowledge of Curriculum and Assessment, Change Agent, Optimizer, Communication) to determine level of principal ability in leading a change. Although the meta-analytic nature of this study allowed the authors to consider a larger amount of research over three decades, the results should be interpreted with some caution given that literature they reviewed defined many of the change leadership domains differently and may reflect vastly different accountability contexts.

As would be expected, the absence of effective change agents can adversely impact the success of instructional change. In a 2002 action-research study on a proposed school change framework, entitled "Change Frames," Retallik & Fink (2002) conducted two years of semi-structured interviews, focus groups and classroom observations across six school sites to study and "assist to develop processes to anticipate, analyze, implement and sustain school-based change" (p. 93). The researchers found that both change leadership skills and organizational management skills, as identified through interview transcript coding, were essential for the successful application of the Change Frames approach. They note one principal studied, "…who was visionary in her own way and well-liked as a person, was never able to establish the necessary systems or develop appropriate strategies to accomplish changes that staff supported" (p. 102). The researchers concluded that both leadership and management skills were necessary to bring about effective school change, and those leaders in their study who did not embody both

competencies were not successful in implementing change. Because this study involved action research, the findings may not be transferable to settings without this ongoing type of support structure.

The impact of a change leader, whether it be the principal or another staff member, may not only affect the outcome of the change initiative, but also affect teacher levels of confidence in their own instructional abilities (Waters et al., 2003). Mei Kin et al (2018) found that the teachers' perceptions of the change leader's skills impacted teachers' beliefs in themselves to change and their willingness to adopt that change. In the next portion, I review how the relationship between an instructional innovation and teachers' individual contexts has the potential to impact teachers' change adoption.

Relevance to Daily Work

Roth et al. (2011) studied upper elementary school teachers' adoption of science lesson sequencing in planning their course topic order for the school year. Participating teachers (n=48) were divided into a control group (n=16) and an experimental group (n=32). Both groups attended a 3-week intensive PD session over the summer where the focus was on creating instructional science lesson topic sequences that were based on a linear story instead of traditional standards-based pacing. While the control group received no additional professional development after the summer institute, the experimental group received ongoing video analysis and reflective work sessions with the professional developers totaling an additional 102 hours of professional development for this innovation.

Through the video analysis of three lessons (pre/mid/post research), as well as comparison of student performance on a standardized content test between the control and experiment groups, the researchers found that students in the experimental group scored an average of 15 percentage points higher on the end of course standardized science assessment than those in the control group. Further, researchers found that the lesson video analysis revealed that the experimental group applied a statistically significant higher rate of the PD objectives to their instruction than the control group. The researchers attributed this difference in application levels to the ongoing adjustments needed to meet classroom needs and then adjusted PD learning to the realities teachers were facing in the curriculum. Put simply, effective PD "enables teachers to see content and teaching issues embedded in real classroom contexts" (p.25). While promising, this study should be viewed with some caution, as the ongoing purposeful revisiting of the initiative likely kept it on the front burner for participants in the experiment group.

Another notable conclusion of this study highlights the importance of PD relevance to the specific content area being taught by participant teachers (Roth et al., 2011). This same concept was studied by Webster-Wright (2009) in a meta-analysis of 203 research studies on professional development across industries, although the bulk (40%) of articles included were from the educational field. They considered peer-reviewed studies that included measurements of actual student outcomes and required verification of teacher application of the objectives of the studied professional development training. Through her analysis of the literature, Webster-Wright concluded that effective PD is considered "authentic" by teachers, when developed and delivered in a way that acknowledges both the classroom conditions and supplemental requirements

teachers face each day. Her metanalysis findings included that "…we accept that professional knowing is embodied, contextual, and embedded in practice; that the change of learning occurs through practice experience and reflective action within contexts" (p. 724).

In her 2018 study, Girardet highlights the need for relevance through a metanalysis of 219 peer-reviewed empirical studies considering changes to classroom management approaches for pre-service and experienced teachers. The author's study attempted to answer the question, "Why do some teachers change over time, while other do not?" (Girardet, 2018, p. 4). Studies were selected by the researchers for analysis that focused on teacher change and variations of classroom management after professional learning. A key condition the researcher identified as necessary for the sustained adoption of the approach was a strong connection to the teachers' classroom contexts. The author concluded, "…it is useful to design programs that build bridges between the different settings in which the teacher learns…. specific factors of change seem to be quite limited to specific places" (p. 21). Additionally, she recommended that mentors and professional developers spend extended time within the school and context in which teachers work prior to developing and delivering professional learning to increase PD alignment and relevance to teachers' needs. One teacher need that continually surfaces in the literature is the instructional materials required for teachers to utilize during classroom instruction.

Resource Alignment to Proposed Innovation

Teachers utilize a variety of instructional tools in their craft. Although some of these tools are selected at the teacher's discretion, others, such as textbooks, assessments, and other curricular materials, are typically adopted by school divisions and their use is mandatory (Watt,

2007). The potential dissonance or alignment between these mandatory resources and the objectives of an instructional change initiative are explored by Hayes et al. (2020).

In this study, the researchers studied teacher implementation of an initiative entitled "Science Learning Partnership (SLP)," aimed at having teachers understand and implement new state science standards, over a 9–15 month study period. After a five-day summer institute and three Saturday workshops over the course of two academic years, the authors initially followed 63 teachers in year one, with an additional 21 teachers in year two, conducting semi-structured interviews at the mid-point and end of each academic year. The researchers found that organizational barriers, specifically outdated textbooks and science kits, prevented teachers from readily applying the professional development they received. The researchers also found that a substantial number of teachers who shared they were not implementing the SLP learning were, instead, relying on following the misaligned textbook resources instead. Notably, this study relied on teachers' self-reporting their instructional approaches and was not verified through classroom observation or student achievement data, which is a significant limitation.

Just as a dissonance between resources and a proposed instructional innovation can hinder adoption, a strong alignment can promote adoption. A 2016 study by Lee et al. explored the application of a science intervention for students classified as English Language Learners. This researchers' study utilized a randomized controlled trial design to compare the impact of the application of the P-SELL (Promoting Science Among English Language Learners) intervention among 103 fifth grade teachers across 33 experiment schools versus non-use within the classrooms 116 fifth grade teachers at 33 control sites. Lee et al. (2016) measured student

outcomes on a standardized science assessment, along with teacher questionnaires regarding teaching approaches given at the start of the school year and the end of the school year to determine if a positive effect could be contributed to the P-SELL training. Their findings showed that, "this positive effect could be attributed to consistent implementation of the key features of the intervention (i.e., standards-based, inquiry-oriented, and language-focused) for all students and ELLs in particular through educative curriculum materials and professional development" (p. 579).

They noted that the teacher training in the use of the P-SELL intervention included aligned curricular resources and learning materials, creating a cohesive learning experience for the participating teachers. Although the authors' research intention was not to isolate curriculum alignment as the sole factor affecting P-SELL use, and additional factors likely impacted the innovation's success, their findings do illustrate the potential impact of resource and change alignment. Their findings highlight how a controllable condition, such as curricular material choice, can impact the adoption of an innovation and may be worthy of thoughtful consideration when planning an instructional change. Another resource affecting the daily conditions of teachers is time; as time impacts teachers' daily work, it also can impact instructional innovation initiatives.

Time: The Scarcest of Resources

In a 2020 quantitative study examining teacher implementation of instructional methods that supported student learning through the use of 1:1 computers, Powers and Musgrove found that of the 333 teachers participating the study (across multiple school systems), those who

received dedicated release time for practice and preparation of the desired new teaching strategies (through a series of early release days for students) showed self-reported increased levels of adoption of the strategies when compared to those who did not receive additional planning time, as measured through surveys. The researchers also found that teachers' perceptions of the 'ease' of 1:1 technology was influential in their use of this teaching strategy, but not as influential as their time to plan.

The authors found that the influence of teachers' perceptions about how easy they believe 1:1 is to use may not play as important a role in their actual use of 1:1 for individualized instruction when higher levels of planning time are present in their schools. (Powers & Musgrove, 2020). This study's limitations revolve around how application of the studied change was reported. Participants self-reported their use of 1:1 computers through survey responses, and observations of actual use of the instructional approach were not used to verify any responses.

A similar outcome was noted in a qualitative case study by Mee and Mee (2013). In this study, the researchers studied six teachers at a medium-sized middle school where a new student-centered planning approach was being piloted that had teachers use common planning time to follow a protocol regarding individual student case studies. They selected teachers for the study who were experienced (tenured) and full-time employees. Along with the new protocol for discussing student needs, the participants were given increased common planning time to understand the new system and apply the recommended changes. Mee and Mee found that the desired changes in student performance and behavior were noted earlier than anticipated, and teacher morale unexpectedly improved. The authors concluded the study recommending

increasing early release days or built-in teacher workdays with clear expectations as part of the program's design for further roll out.

School systems frequently try to create aligned planning times and release time for teachers among a grade level team or subject area with the goal of teachers using their limited time working together (Levine & Marcus, 2007). This common planning time allows for teacher-to-teacher collaboration, which can be a factor in change adoption.

Teacher Collaboration

Teacher collaboration has been the focus of many research studies (Leana & Pil, 2014). In a 2004 mixed-methods study of collaborative approaches employed by school leaders, Thompson et al. utilized closed-ended surveys and open-ended focus groups and interviews with 45 teachers and six principals across six research sites in the Midwest and New England. The interviews and surveys focused on leaders' beliefs about the utility of collaboration and teachers' experiences with collaborative practices in their work settings. The researchers then examined teachers' level of comfort with their own risk-taking behavior (trying new things), and their level of ownership in the academic goals at their school sites. The researchers found that in schools where collaboration was deemed a strong value by the school leaders, teachers had higher levels of risk-taking behavior and stronger buy-in to their school vision. They also found that student achievement gains were more significant in these same research sites. The researchers noted that student achievement results were provided by principals but never verified.

While Thompson et al. (2004) found that leaders' beliefs in collaboration may create the conditions for an innovation to take hold (through teachers willing to take risks), Pedder and

Opfer (2011) studied the classroom application of new learning among teachers in the context of teacher collaboration. In their quantitative study, the researchers analyzed survey data from 388 schools in England, selected from a larger data set in England's National Foundation of Educational Research database. Their sample inclusion criteria included public schools, and was representative of the country's geographic, achievement, socioeconomic and racial diversity. Through their analysis of the survey data, the researchers aimed to compare teachers' self-perceived applications of professional learning to their responses regarding their use of collaborative planning. The researchers found a positive correlation between teacher positive responses to the survey question, "I engage in collaborative teaching and planning as a way of improving practice," (p. 450) and levels of teacher engagement in trying new instructional approaches learned through professional development. These researchers also found that teachers who reported that they value collaboration for their own professional growth were more likely to report incorporating aspects of professional learning into their instructional approaches.

Although these studies outline the potential positive outcomes from collaboration, researchers failed to consider some negative outcomes noted in various other studies. A 2010 study by Bruening followed 199 pre-service teachers and measured their perceptions of individual motivation based on demographic characteristics (e.g., race, gender) at two points: the end of their coursework but before student teaching and again at the end of their student teaching internships. Through quantitative survey analysis, the authors concluded that pre-service teachers ended their coursework with limited racial bias towards perceived student motivation, but after experiencing the peer collaboration and professional experience that comes

with an internship—these maladaptive beliefs began to emerge. It should be noted, however, that the researchers failed to discuss any site-based conditions that could have led to this increased bias and did not control for different educational settings (including school demographics, participant demographics, or the structure of the participants' school-based support networks).

Additionally, studies have found that not all teachers necessarily respond positively to collaborative practices. Johnson's (2003) study entitled, "Teacher Collaboration: Good for Some, Not So Good for Others," revealed negative outcomes associated with teacher collaboration. Johnson's study spanned four research sites with a total of 24 participants and included the principal at each site and 20 teachers. Through an open-ended questionnaire and semi-structured individual interviews, the researcher uncovered negative themes associated with collaboration including work intensification, loss of autonomy, interpersonal conflict, and factionalism. Although Johnson was unable to account for the consequences created by restructuring of several schools during the study, his results do serve as a reminder of the necessary conditions that may be needed for teacher collaboration to be effective.

Researchers have identified structured approaches, such as the formal use of professional learning communities (PLCs), aligned to the desired pedagogical change and are used to inform future teacher support (Hargreaves & O'Connor, 2018; Thompson et al., 2004; Weddle, 2022). PLCs are defined as groups that are "working collaboratively in ongoing processes of collective inquiry and action research to achieve better results for the students they serve"(DuFour, 2013, p. 13). Typically, PLCs involve subject or grade level teams meeting regularly and following a

formalized agenda to plan instruction and solve instructional or student challenge (Hargreaves & O'Connor, 2018).

This concept of structures for effective teacher collaboration during pedagogical change was studied by Wells and Feun (2013). The authors of this study focused on the use of PLCs at suburban eight middle schools between two school districts through a survey study including Likert scale survey questions that also included open-ended questions. The researchers' aim was to determine if PLC structures affected the application of professional learning goals within each research site. Wells and Feun found that District A showed significantly lower means across survey measures of PLC effectiveness; the researchers postulated that it was the PLC structure that affected teacher application of the school's pedagogical goals. Further, the researchers found that conditions in District B included supportive conditions such as time, leadership, and a shared vision, which they argued likely impacted the effectiveness of the PLC model and, therefore, the application of professional learning.

In addition to PLC models for teacher collaboration in support of an instructional innovation, another formal collaborative approach increasingly used by teachers is the Lesson Study Model (Lewis & Takahashi, 2013). In their 2020 meta-analysis of peer-reviewed research on use of lesson studies to change teacher practice, Benedict et al. (2023) analyzed 70 studies out of an initial 479 articles identified, selecting those projects with findings that included measurable student outcomes or observed teacher change for analysis. Their findings supported the use of lesson studies as "a mechanism for teachers to take newly acquired knowledge and situate it within their daily instructional repertoires" (p. 12). They also noted that those studies

with the most effective outcomes of change included professional development explicitly tied to the lesson study model and included an external facilitator as part of the lesson study process. The authors caution that their "stringent" selection criteria excluded significant results of the lesson study research field as a whole.

Whereas collaborative structures involve team approaches to solving educational challenges and implementing changes, a more personalized approach to support has been identified in the literature as instructional coaching (Blanchard et al., 2016). In this next portion, I review literature surrounding instructional coaching and its impact on teacher pedagogical change.

Instructional Coaching

According to Knight (2012), instructional coaching is defined as, "…a former teacher whose central role is to partner with the principal and teachers to bring research-based instructional practices into classrooms" (p. 54). Coaching is a highly personalized, often one-on-one approach to supporting teacher continuous improvement (Knight, 2012). Powell et al. (2010) studied the impact of instructional coaching on the improvement of preschool literacy instruction. In their study, the researchers randomly assigned Head Start (Title I Preschool) teachers to either a control (n= 31) or a treatment (n=42) group. Teachers in both groups received a two-day professional development training on preschool literacy instructional approaches, while teachers in the treatment group also received bi-weekly individual coaching sessions to support the professional learning. Students' reading scores were then measured by the authors after two years of program implementation, and those within the treatment group showed

significantly greater literacy gains on a variety of standardized measures. Additionally, the researchers conducted on-site observations of literacy lessons across all participants and found those in the experiment group demonstrated higher performance on classroom literacy quality assessments.

Carlisle and Berebitsky (2011) also studied the application of new literacy approaches by studying first grade teachers' applications of professional learning with and without supportive instructional coaching. The teachers in this study completed professional development on changes to literacy approaches through the LETRS (Language Essentials for Teachers of Reading and Spelling) program as part of a state level Reading First legislative literacy initiative. The study population included 76 teachers across 45 schools in nine districts. Teachers were divided into two groups: LETRS training with supportive instructional coaching and LETRS training without instructional coaching. The researchers found that those participants who had coaching support for the implementation of the LETRS learning not only used the approaches more frequently (as documented through observations) but also saw increased student achievement in reading as measured by selected subtests in the DIBELS reading assessments.

Although these researchers found the potential impacts of coaching to be notable, there is additional research that finds that teacher beliefs can serve as the gatekeeper for engaging with such supports (Locke et al., 2019). In this next section, I review the literature on teacher belief systems to better understand its potential impacts on the factors that I have discussed.

Teacher Internal Belief Systems

Combs (1972) defined teacher beliefs as a ‘professional set of guidelines for teaching,’ and contends that these guidelines drive attitudes towards being open-minded regarding innovation and collective professional learning. As impactful as these reviewed external factors are in affecting teacher change, Locke et al. (2019) found that individual teacher attitudes and beliefs impacted implementation of an instructional innovation more than the wealth of organizational conditions normally prioritized by school or school division leadership.

In their 2019 quantitative study of teacher application of evidenced-based practices (EBP) in their instruction of students with autism, Locke et al. (2019) studied 67 autism support teachers and 85 classroom staff from 67 classrooms across 52 public elementary schools in the northeastern United States. Participants completed EBP training through didactic group professional development and received monthly coaching check-ins for two hours per session during the duration of the one-year research study. Participants completed surveys measuring their beliefs about EBP and their building conditions at the start and end of the school year. Their implementation of EBP was then measured by researchers through teacher surveys, along with follow up surveys about beliefs regarding EBP.

The researchers found that there was a strong positive correlation between teacher beliefs about EBP prior to the training and their eventual use of the innovation. Further, their research suggested that the building conditions had little to no impact on the application of EBP in classrooms, and teachers with negative beliefs regarding EBP maintained these beliefs throughout the entire study. The authors cited the lack of objective observations of actual

implementation of EBP as a limitation of the study and cautioned that teachers self-reporting their application should be confirmed through future research.

In a 2022 systematic literature review, Wray et al. studied teacher beliefs not about an innovation, but about their own abilities to be successful in implementing one. Their study considered how teacher self-efficacy, or a teacher's belief in their own capacity to successfully instruct their students, impacted their implementation of an instructional innovation in their classroom. The authors reviewed the findings of 71 peer-reviewed empirical studies that included quantitative data focused on the use of inclusive teaching practices and teacher self-efficacy. The researchers found that those study participants who had positive experiences with inclusive practices as part of their teacher training were more likely to believe in their own ability to use them successfully in their own instruction. Further, the authors found that those teachers who showed higher levels of self-efficacy in this area were also positively correlated with increased rates of adoption of the inclusive practices being studied.

The authors noted that teachers' self-efficacy was deemed more impactful in predicting the use of inclusive teaching practices than the severity of students' special education needs, school demographics, or years of teaching experience. They authors concluded, "…teachers with strong self-efficacy beliefs seem to be more prepared to experiment with, and later also to implement new educational practices" (p. 228). They recommended that teacher preparation programs provide opportunities for inclusive instruction experiences to increase teacher confidence in working with students with disabilities.

Although Wray et al. (2022) noted that teacher experiences impact self-efficacy, Evers et al. (2002) found that the concept of "burnout" was the leading indicator of teacher self-efficacy levels. In their study, "Burnout and Self-Efficacy: A Study on Teachers' Beliefs when Implementing an Innovative Educational System in the Netherlands," the researchers were interested in determining if there was any relationship between teacher burnout levels and their success implementing a nationwide secondary education initiative entitled, "Study-Home System" (SHS). The authors' research sample included 490 randomly selected teachers across the country who were expected to implement the SHS. Three questionnaires were given to participants which included: The Maslach Burnout Inventory for Teachers, a self-efficacy questionnaire, and a survey on teachers' attitudes concerning the usefulness and effectiveness of the SHS innovation. The authors found that the higher the burnout level was for the respondents, the lower their self-efficacy beliefs and the less positive they viewed the implementation of the SHS program. The authors concluded, "…teachers with strong self-efficacy beliefs seem to be more prepared to experiment with, and later also to implement, new educational practices" (p. 228).

Similarly, in a longitudinal study of teacher burnout and innovation in Greece, researchers found that as teacher burnout rates decreased so did teachers' use of educational innovations promoted by the school division (Karavasilis, 2019). Through the use of a survey distributed to a participant group of 324 primary and secondary Greek school teachers, the author aimed to study if there were correlations between teacher burnout (as measured by the Oldenburg Burnout Inventory) and Innovative Work Behavior (as measured by an author-created survey

studying five identified characteristics of innovative work behavior as measured through five close-ended survey questions). Karavasilis found a strong negative correlation between participant burnout levels and their application of innovation instructional practices. The author also found that as teachers found success with the innovation, their engagement and belief systems were positively affected, "…creating a virtuous circle, where one feeds the other" (p.7).

These researchers' findings point to a variety of internal and external factors that can impact a teacher's adoption of an instructional change. The studies I reviewed focused on conditions including change leadership, relevance to daily work, resource alignment, time, teacher collaboration, instructional coaching, and internal teacher belief systems, in order to situate my research. Although my focus thus far has been on the initial adoption of an instructional innovation, in alignment with my study goals and proposed research site, I will next explore conditions impacting the ongoing use of an innovation once it has been adopted.

Sustaining Change After Adoption

The initial adoption of an educational innovation does not necessarily guarantee its ongoing use. In a 2022 systematic review of empirical literature regarding sustainability of innovations, Prenger et al. analyzed the findings of 44 studies that included longitudinal data on educational innovations. The researchers selected studies for inclusion that focused on the implementation of programs that fit their project definition of innovation:

> …the intentional introduction and application within a role, (work)group, or organization of ideas, processes, products, or procedures new to the relevant unit of adoption, designed to significantly benefit the individual, the group, the organization, or wider society (p.2).

Within the studied literature, the researchers found that 31 of the 44 articles reviewed did not include definitions of what successful sustainability would look like for the innovation studied beyond its continued use. Nine studies defined sustainability as when innovation becomes a regular part of the organizational routine and is no longer perceived as something new or added to teacher practice. The remaining studies had specific time-bound metrics for long-term success.

With these definitions in mind, the researchers explored which studies demonstrated ongoing sustainability of their studied innovation, and what factors supported that ongoing implementation. In alignment with the factors that I previously discussed within this literature review, the researchers identified various impactful variables including: the quality or effectiveness of the innovation, teacher beliefs of the innovation, organizational supports, positive reinforcement for its use, individualized support, and leadership characteristics. Although the study did not capture the rate of ongoing innovation adoption among the studies reviewed, it does illuminate the notion that the factors needed to sustain an innovation may be parallel to those needed for the initial adoption of an innovation.

Desimone et al. (2013) studied the implementation of an instructional intervention in elementary mathematics instruction at Title I schools through a longitudinal study involving sample groups of over 400 teachers across 30 schools over the course of four years. The researchers aimed to study the levels of application of Eisenhower Professional Development Program learning, a federal government initiative as part of the Title II of the Elementary and Secondary Education Act. Desimone and her team utilized mailed surveys to participants over

the research period to measure teachers' self-reported participation in professional development opportunities and their instructional approaches in the classroom. The researchers found that teachers who were given ongoing professional development over the four years showed increased use of the interventions and statistically significant student achievement gains. The authors acknowledged that their measure, which was heavily reliant on self-reported survey data by teachers and did not control for other interventions at the study sites, may not capture other influences outside of their sphere of study.

Sustaining an instructional innovation may not always be an appropriate goal. In the field of literacy alone, researchers have learned that once-innovative instructional methods, such as the three-cueing system for reading, were in fact detrimental to the process of early readers' learning how to decode (Davis et al., 2021). In cases like these, sustaining a poor practice would be counterproductive, highlighting the necessity for ongoing change to be accompanied by appropriate program evaluation to ensure that expected benefits are being realized for students (McDonald et al., 2007). In this final portion of the literature review, I explore the purpose of program evaluation for instructional innovations.

Program Evaluation

Program evaluations, "…a systematic application of scientific methods to design, implement, improve, or measure the outcomes of a program," (Porter & Frizzell, 2018, p. 1), may be utilized to formally examine the impact of an education innovation or reform initiative (Porter & Frizzell, 2018). The benefits of a program evaluation are their systemic nature and ability to consider the multiple inputs and outputs present in a complex system, such as a school

(Mertens & Wilson, 2018). Additionally, program evaluations allow consideration by the evaluators of the myriads of contexts in which a program may be conducted. The complexities within each of these systems are often also considered by evaluators when reviewing the success or impact of an evaluated program.

There are a variety of types of program evaluations that may be conducted, and their designs serve different purposes and often involve different stakeholders (Mertens & Wilson, 2018). For example, evaluations that focus on areas in need of improvement with a specific program may involve different participants than those evaluations conducted to evaluate the human rights or social justice implications of a given practice (Mertens & Wilson, 2018; Milstein & Wetterhall, 1999). For newer instructional initiatives, implementation evaluations can provide early insight to change leaders about a programmatic change by studying both the implementation process that an organization used with a new program, as well as early program outcomes.

A 2005 study on a large-scale literacy initiative serves as an example of the potential impact of an implementation evaluation. In this evaluation, Borman et. al (2005) measured the impact of the *Success for All* (SFA) reading program on student outcomes after one year of implementation. Researchers used a randomized study design comparing student reading gains between treatment schools using SFA and control schools using existing reading resources. Teachers in the treatment group received the professional development and coaching support that is standard with SFA adoption, while the control group teachers were only monitored to ensure they were not implementing any SFA resources.

The researchers found that, despite significant investments in teacher training and expensive textbook adoption, there were no measurable differences in student performance in three of the four measured reading areas across treatment and control schools. They did find, however, that student progress in the Word Attack (decoding) subtest for students in the experimental group accelerated their learning by over two months compared to the control group. The data from this study informed the implementation of SFA (and related materials and training) for the divisions and allowed them to reprioritize resources where appropriate early in the adoption.

There are a variety of evaluation types to consider for ongoing instructional initiatives, such as a program adoption, that researchers have found may be appropriate for the dynamic nature of schools with constantly changing student needs (Patton, 2011). One such evaluation approach is a developmental evaluation, which involves the evaluators (typically from outside an organization) working closely with the staff of the program being evaluated to offer ongoing continuous improvement instead of static final findings often found in other program evaluations. This type of evaluation may be employed by school systems as part of an ongoing cycle of study and improvement that also includes traditional outcome evaluations that focus solely on a program's outcomes.

Fagen et al. (2011) used a developmental evaluation to study the instructional impacts of a mandatory sexuality education school board policy in Chicago Public Schools. Through the use of an embedded evaluation team, the external evaluators conducted site visits (that included observations, document reviews, and participant interviews) across three study sites. The

evaluators were able to determine key factors across the sites that were leading to increased application of the requirements of the board's policy and make real-time recommendations at each study site to improve program outcomes—and then study those impacts immediately for additional refinements. As a result, the ingredients that the researchers identified were necessary to improve the application of the board policy were formalized in future program iterations, leading to the sexuality education policy being expanded to additional Illinois school divisions across the state. The impacts of Fagen et al.'s study suggest that this approach to research can, in fact, impact the success rates of an instructional change in a school system.

Summary of the Literature

The literature I reviewed in this chapter provides a macro view of the forms of instructional changes that teachers may experience, the conditions that support or inhibit the adoption of a proposed change, and steps that may be taken to evaluate the effectiveness of an adopted instructional innovation. Although researchers have found that change in instructional practice is, in itself, a constant for effective teachers (Richardson, 1998), when compulsory changes are considered, there are a variety of factors that may impact their eventual adoption. Innovations that are implemented with timelines that are too aggressive to allow for proper teacher practice and training may lead to lower levels of teacher adoption and more disengaged students (Bojović et al., 2020; Chakraborty & Maity, 2020; Garbe et al., 2020; Pokhrel & Chhetri, 2021).

Instructional changes are often implemented by school and division staff through the use of professional development training sessions (Sims et al., 2021). The structures and conditions that teachers experience after their professional development impacts rates of adoption of an innovation (Sims et al., 2021; Sims & Fletcher-Wood, 2021). The presence of an effective change leader, whether it be a school principal or teacher leader, is a necessary ingredient for teacher change (Fullan, 2007; Hord & Hall, 1987; Retallick & Fink, 2002). Effective change leaders leverage their knowledge of the local context, as well as their skills with capacity-building and social conflict resolution, to ensure that teachers have the resources and support network needed to support adoption of the innovation (Hord & Hall, 1987).

A clear connection between the proposed (or mandated) innovation and the daily realities of a teacher's job are also important for a change to take hold (Roth et al., 2011). This alignment is crucial during the professional development portion of an innovation's implementation, where teachers' direct understanding of the expected implications for their daily instruction and potential benefits for their students should be outlined (Webster-Wright, 2009). Additionally, this strong alignment should also extend to the curricular resources that teachers are expected to use (Lee et al., 2016). If the instructional changes being asked of teachers are in conflict with either teachers' day-to-day instructional needs, or the resources that they are given to teach with, then there is a lesser likelihood they will be widely adopted by teachers (Hayes et al., 2020; Lee et al., 2016; Roth et al., 2011).

Changes asked of teachers often take time to learn, practice, and apply as intended. As school change leaders consider plans associated with the roll out of an instructional innovation

for teachers, it is beneficial to ensure that appropriate time is allotted to teachers for these purposes (Mee & Mee, 2013; Powers & Musgrove, 2020). In addition to using time for learning and practicing a new skill, this time can also be used for teachers to collaborate in order to problem solve and share experiences regarding the instructional mandate being used (Pedder & Opfer, 2013; Thompson et al., 2004). Although collaboration has been found to be supportive of teachers adopting a change, guidance and oversite are necessary to ensure that staff members who may not be in support of the change are not actively working against the innovation and therefore poisoning the waters of change (Johnson, 2003). One effective method of collaboration that can avoid this pitfall involves the use of instructional coaches, normally experienced teachers who do not have classroom responsibilities, to work individually with teachers and help them navigate the challenges and needs associated with applying a new instructional approach (Carlisle & Berebitsky, 2011; Knight, 2012).

Teacher internal beliefs, both about their individual capacity to be successful at using an innovation, as well as their attitudes towards an innovation in general, can impact their willingness to adopt a change (Locke et al., 2019; Wray et al., 2022). Avoiding teacher burnout, such as through the use of the supports previously mentioned, had been found to increase lower rates of teacher burnout (Karavasilis, 2019).

After the implementation period of an innovation has passed, these same supportive conditions that were found to improve rates of teacher adoption may be necessary to sustain the instructional approach (Desimone, 2009; Prenger et al., 2022). Formal program evaluations, such as a developmental evaluation, can provide valuable feedback on the success of a program's

implementation as well as real-time recommendations for improvements to increase the effectiveness and use of the instructional change.

Chapter Three: Methods

Instructional change occurs slowly or quickly, by choice or by mandate, and with various levels of success and longevity (Chakraborty & Maity, 2020; Pokhrel & Chhetri, 2021; Richardson, 1998). In the case of my local context, Mountain Valley Public Schools (MVPS) (pseudonym) was implementing a large-scale shift in literacy instruction through the adoption of a new reading program, Houghton Mifflin Harcourt *Into Reading* (HMH). This adoption was occurring quickly due to a mandate included within the Virginia Literacy Act (VLA) requiring that all Virginia Public Schools adopt an approved curricular resource of English Language Arts instruction for the 2024-2025 school year (S. Swanson, personal communication, July 8, 2024; Y. Billingham, personal communication, July 2, 2024; *Virginia Literacy Act*, n.d.). Aside from the VLA mandate, student reading performance in Mountain Valley Public Schools had remained below the state average with significant gaps in achievement among student membership groups, especially with students of color, and overall student performance (see Table 1.2). Literacy instruction in MVPS was described by school division leadership as "inconsistent," and "based on tradition, not research," (S. Swanson, personal communication, July 8, 2024), suggesting that ELA instruction was ripe for change.

Although MVPS was implementing the HMH program for the first time, there were other school divisions in Virginia that had implemented similar literacy programs for more than five years, including Ridgetop Public Schools (RPS) (pseudonym). The purpose of this study was to identify and examine the key conditions that led to the successful implementation of this program by RPS elementary teachers identified as "Successful HMH Implementers" by division

leadership. I used the findings of this research to formulate recommendations to improve the likelihood of a successful adoption by MVPS teachers. While researchers have found that changing teacher instructional practices can be difficult, they have also determined that the adoption of new instructional programs may indeed change teachers' pedagogical behavior and improve student achievement (Cordingley, 2015; Desimone, 2009; Garet et al., 2001; Little, 1989; Stern et al., 1989).

In this study I aimed to answer the following questions:

1. What lessons can be learned for Mountain Valley Public School's literacy instruction by studying one other school division's successful HMH implementers?

    1a: What do the successful HMH implementers perceive as the key conditions that affected their investment in the literacy program?

    1b: What conditions, after the initial program implementation, do successful HMH implementers and division staff believe led to the ongoing use of this resource and continued improvement in their teachers' classrooms?

    1c: What teacher perceptions of this program, do participants believe, were impacted during the implementation process, and do they believe that those perceptions changed over the course of implementation?

I considered these research questions through the lens of Rogers' Diffusion Process by Innovation Theory (Rogers et al., 2014). As described by Rogers, the success of a change is largely dependent on teachers' decisions whether or not to implement, or invest into, the change

(2014). There are working conditions and strategic decisions by school division and school site leadership that can impact educators' willingness to adopt a change. Those conditions and approaches by leaders that may have contributed to the studied teachers' decisions to change their pedagogical process were studied with the goal of developing recommendations for MVPS to consider in their program implementation process.

Study Design

For my research, I conducted a descriptive case study on the implementation of HMH within Ridgetop Public Schools (RPS). I focused on the conditions that led to the successful implementation of the HMH Reading Program for my study participants and considered both the internal and external conditions that may have impacted their investment in this resource. My research included analyses of data collected from both the studied school division at-large and the individual school sites of participants that, together, influenced their teaching behavior. I employed a descriptive case study research design as this study's method of inquiry because it allowed me to describe the phenomenon contextually for each participant. This approach was both in direct alignment with my research questions and also allowed me to focus on the conditions that led to the participants' individual decisions to adopt the instructional change (HMH program implementation), as depicted in Rogers' Diffusion Process by Innovation Theory (Lucas et al., 2018; Rogers et al., 2014).

Yin has noted that case studies are particularly powerful forms of research when trying to identify the causal factors, the 'why,' and 'how,' within a particular area (2013). Case studies are often categorized as comparative case studies or multiple case studies (Yin, 2015). Within

comparison studies, similar phenomena are studied across multiple subject areas and then compared (Takahashi & Araujo, 2020). Qualitative research is often influenced heavily by factors within the study participants' contexts (Takahashi & Araujo, 2020). Multiple case studies, the approach that I used in this project, however, allows for patterns of similarities and differences across multiple individual contexts, and allowed me to identify those points of convergence when drawing findings (Stake, 2013).

Study Context

Ridgetop Public Schools shared various similarities with MVPS, my local context, and was well-suited to enhance the relevance of my recommendations. Ridgetop Public Schools, a medium-sized urban school system located in central Virginia, had approximately 4,000 students across 11 school sites (one high school, one middle school, six elementary schools, three specialty centers). The demographics of the student body included: 40.0% White, 28.0% Black, 13.1% Hispanic/Latino, 5.3% Asian, 13.6% Multiple Races. I selected this site largely based on three main factors: history with HMH adoption, demographic similarities to MVPS Title 1 schools, and convenience sampling.

The demographics of MVPS included: 58.0% White, 12.0% Black, 16.8% Hispanic/Latino, 6.3% Asian, 7.1% Multiple Races. Of the 15 elementary schools in MVPS, three were not currently fully accredited by the Virginia Department of Education due to achievement deficits. As noted in Table 1.2, there were significant achievement gaps in MVPS with overall scores versus the performance of several student membership groups including Black (33% pass rate), Students with Disabilities (36% pass rate), and Economically

Disadvantaged (34%). Although the demographics between the two divisions overall did not align perfectly, the demographics of the three unaccredited Title 1 schools in MVPS were very similar to those of RPS overall (see Table 3.1), and this allowed for targeted recommendations for these sites that are more relevant to the context of my potential research site.

Table 3.1

English Reading SOL Performance

Student Group	RPS Overall	MVPS School 1	MVPS School 2	MVPS School 3
Asian	6.1%	8.6%	4.2%	10.3%
Black	26.2%	17.9%	14.8%	32.4%
Hispanic	13.6%	30.4%	29.1%	27.4%
White	40.2%	34.8%	43.5%	21.3%
Multiple Races	13.8%	8.0%	8.1%	8.4%
Students with Disabilities	12.5%	12.9%	13.9%	10.7%
Economically Disadvantaged	63.3%	55.9%	40.5%	55.0%

Because the purpose of this research was to study teachers within the context of a division that has adopted the HMH program, RPS was a useful study site given that it had adopted the program prior to the VLA mandate, specifically RPS is in its sixth year of

implementation. Ridgetop Public Schools piloted the use of the HMH reading program in Fall of 2019 in select classrooms in the school division and later adopted it for all six RPS elementary schools in 2020 as part of their 2020 Equity Commitment Initiative. Because this program was approved by the Virginia Department of Education as meeting all the required standards of the VLA, RPS leadership chose to continue its use to meet the requirements of this law.

Five of the six elementary schools in RPS were fully accredited by the Virginia Department of Education, however, achievement gaps did persist between target demographic groups. Between 2021 and 2024, RPS students' English Reading Performance pass rates, as measured by the Virginia Standards of Learning, lagged behind the overall state pass rates by 8-10 percentage points. The difference between student membership group performance was also substantial, notably for students identified as Black (40% Pass Rate) and Students with Disabilities (37% Pass Rate), however these students outperformed MVPS students across these categories.

The HMH reading program, referred to by the publisher as *HMH Into Reading*, was marketed as being, "…built from the ground up using the latest in literacy research to ensure every student learns to read and write with confidence" (*HMH Into Reading | K-6 Reading Curriculum | HMH*, n.d.). The HMH program utilized a "Teacher Success Pathway" that outlined the programmatic requirements including expectations for planning, teaching, and assessment. The HMH program contained lessons targeting the "5 Pillars of Reading Instruction," as identified by the National Reading Panel (2000), namely: phonemic awareness, phonics, fluency, vocabulary, and comprehension. This program was marketed as a comprehensive system for

ELA instruction and suggested the full use of all its components to ensure that all students' literacy needs are met. In short, teachers adopting this program were expected to use all the resources within it, which may have required the purposeful abandonment of previous teaching materials.

The HMH publisher cited a 2019-2020 research report on the effects of the *HMH Into Reading* program on student outcomes at a medium-sized suburban Western elementary school of 387 students as an example of its effectiveness (*HMH Into Reading*, n.d.). The study, conducted by a third-party research firm, found that student achievement (as measured by the STAR reading assessment) increased significantly when compared to previous years' student growth rates at the same site. It is notable that the authors of this study failed to disclose any funding or conflict of interest statements withs their findings. However, their research did include several references to the program being implemented with fidelity in the classrooms they observed, and by explicitly defining the conditions of its implementation, the authors painted a useful picture of programmatic requirements that informed this study.

Participants

My study design included participants from two groups, the literacy leaders who oversaw the HMH implementation (RPS Change Leaders), along with the teachers who had to change their literacy instruction as a result of the adoption of the program (Successful HMH Implementers). In order to identify the teacher participants in this study, I first identified and interviewed the RPS division staff who were currently supporting *HMH Into Reading*. As part of my research study agreement with RPS, I requested to be connected to a RPS liaison in the

central office who could assist me in accessing RPS professional development coordinators and literacy leaders with knowledge of the HMH program implementation and, its ongoing maintenance as well as, its current use within RPS schools. I ultimately selected three change leader participants for these interviews, prioritizing participants who had deeper levels of influence and decision-making during the HMH program roll out (see Table 3.2). Two change leaders were current RPS employees, whereas one was no longer employed by RPS but served as the Pk-12 Literacy Coordinator during the initial HMH pilot and division-wide adoption.

Table 3.2

Change Leader Background Information

Participant Name (pseudonym)	Current Role	Supervision Responsibilities	General Duties	Role During Initial HMH Rollout
Charlotte McCall	K-12 Literacy Coordinator	All Literacy Specialists	K-12 Literacy Instruction	Lead Instructional Coach
Ella Peterson	Coordinator of Professional Learning	All instructional Coaches	K-12 Prof. Development and Coaching	Building Principal
Kathleen White	Non-RPS	NA	NA	K-12 Literacy Coordinator

Because my research involved a case study of teachers deemed successful with using HMH, I first aimed to understand what the publishers considered to be appropriate instruction with their program. According to the publisher's guidelines, effective implementation of the *HMH Into Reading* program included: 1) 120-minute daily English Language Learning

instructional block, and 2) teacher access to the "curriculum resources, materials, and environment (e.g., access to internet for digital components, sufficient student texts, classroom conducive to small-group instruction)" (*HMH Into Reading*, n.d., p. 1). Lessons were designed to adhere to a format of 10-20 minutes of whole-class instruction, 45 minutes of small-group instruction, 15-20 minutes of "extended independent reading," and time for additional activities using HMH resources (e.g. vocabulary cards and read aloud routines). The *HMH Into Reading* program included 12 modules per grade, each consisting of five lessons over three weeks, with a total of 15 lessons per module. Of the observed classrooms, researchers noted that teachers completed an average of 62%-78% of the lessons within each module and they considered this rate of application to be successful.

By sharing publisher implementation information such as this with the literacy change leader participants in my study, I was able to identify successful teacher implementers with the HMH Program within RPS as potential study participants. The change leaders provided me with the names and contact information for a total of 12 potential teacher participants. Through email correspondence, I ultimately selected three successful HMH implementers based on their availability, previous literacy instructional experience, and when they initially adopted the HMH program (see Table 3.3).

Table 3.3

Teacher Participant Background Information

Participant Name (pseudonym)	Current School	Years of Teaching Experience	Employment Experiences	Year Began Using HMH
Sarah Rodrigo	Barrett Elem.	17	MVPS and RPS	2022
Stephanie Thompson	Ayers Elem.	12	MVPS, DC, RPS	2019
Nicole Franklin	Moncure Elem.	25	MVPS and RPS	2021

These three participants were current RPS teachers, all of whom utilized non-HMH reading materials prior to their training and eventual adoption of the HMH program as required by RPS. The differing levels of literacy experiences among the teacher participants prior to the HMH adoption were relevant to this study for two main reasons. Primarily, the scope of change required for each participant to adopt the HMH program was dependent on their previous experience and behavior. Additionally, Rogers' Diffusion Process by Innovation Theory names *Prior Conditions* as an impactful factor affecting the adoption of an innovation. This stage includes previous practices and norms. By understanding these practices and norms, I was able to better understand the impact of the conditions created that resulted in successfully supporting teacher needs through this stage.

It is notable that all three teacher participants spent some portion of their careers as teachers within MVPS. Given the geographic proximity between the two school divisions, the transiency of staff (and students) between these divisions was not uncommon and may have

provided more realistic responses and experiences that informed my study. Additionally, their experiences in MVPS were potentially reflective of those of the MVPS staff that were undertaking the HMH instructional change, further strengthening the applicability of the collected data.

Data Sources

The data sources for this study included both interviews (with division level change leaders and successful HMH implementers) and documents (both publicly available and RPS internal documents pertaining to program adoption and teacher training for the HMH program provided to me by study participants). By using multiple data sources, I was able to increase data reliability through triangulation (Carter, 2014). Figure 3.1 outlines the data collection procedure I utilized in this study, and Table 3.4 shows which data sources I used to address each of the research sub questions.

Figure 3.1

Data Collection Flowchart

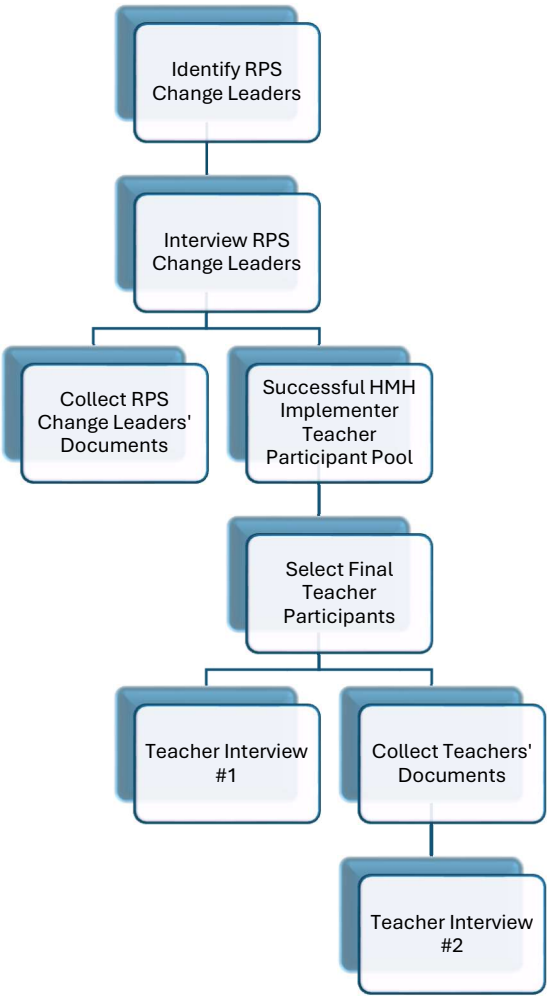


Table 3.4

Data Sources Used to Answer Research Sub Questions

Research Questions	Interviews		Documents
	Teacher Interviews	Division Change Leader Interviews	Meeting Agendas, PD Documents, Curriculum Maps, Instructional Materials, Other Relevant Documents
1a: What do the successful HMH implementers perceive as the key conditions that supported their investment in the literacy program?	x	x	x
1b: What conditions, after the initial program implementation, do successful HMH implementers and division staff believe supported the effective ongoing use and continuous improvement of the HMH program?	x	x	x
1c: What teacher perceptions of this program were impacted during the implementation process, and do they believe that those perceptions changed over the course of implementation?	x		

Interviews

I utilized semi-structed interview protocols to guide my conversations with the three division change leaders and the three teachers considered "Successful HMH Implementers." I developed my protocols based on Brenner's (2006) work surrounding educational research interviews. She suggests that protocols begin with grounding questions establishing context and relationships, which can be used as a foundation for future questions. She states, "Once a clear description is obtained, often with the help of interviewer probes and prompts, opinions and interpretations can be solicited based on the mutually understood content that has been discussed" (Brenner, 2006, p. 363). Thus, the semi-structured interview protocols allowed me to conduct a dynamic conversation based on participant responses, and also ensured that our conversations remain topical (Guetterman et al., 2019). I conducted one interview with each division/school change leader (three total interviews with division/school change leaders), and two interviews with each teacher participant for a total of six teacher interviews.

Each interview that I conducted was done one on one, with the goal of the private format allowing more candid and honest responses (Guetterman et al., 2019). All but one interview was conducted via Zoom due to participant availability and inclement weather. I met with one change leader, Kathleen White, in person. For ease of conversation, I took brief notes during our discussions but relied on audio recordings (via Zoom) for later transcription. I utilized Zoom AI-Assisted transcription for initial transcription of the interview audio files and later verified and corrected each transcript for accuracy.

Prior to using the interview protocols with my study participants, I first piloted their use with several members of my local school community. I piloted the change leader interview protocols with my school system's literacy coordinator, and the successful HMH implementer teacher protocols with three teachers at a neighboring elementary school (to avoid any impacts in their feedback because of my position of authority as a practicing elementary school principal). My piloting of these instruments allowed me to determine if any flaws or limitations required me to revise the instrument or refine my research questions (Kvale, 2007). In addition to observing how the pilot participants respond to the questions, I also asked the pilot participants a series of questions regarding the interview protocol itself, including: *Were any questions difficult to understand? Do you feel as if the order of questions made sense to you as I asked them? Did any questions make you feel uncomfortable?* Based on my participant responses and my observations, I refined the protocols prior to submitting them for IRB approval.

Change Leaders

The protocols that I used with the division change leaders were developed with two purposes: to identify the teacher participants for the study and to gather background information regarding the *HMH Into Reading* initial implementation and ongoing maintenance (see Appendix A). Data from these interviews were used for both my thematic analysis and participant response triangulation. Part of my protocol involved me explicitly defining the working definition for "successful HMH implementer" for this study, which is defined therein, as well as the HMH publisher's expectations for program implementation with fidelity. Although my teacher protocol included a question about additional influential change leaders to consider for the study, my third

change leader was identified unprompted by both change leaders during my initial communications about the study.

Successful HMH Implementers

I developed an initial interview protocol for use with teachers (Appendix B). My intent behind the first teacher participant interview was to gather initial information regarding my research questions and help me organize the scope of my collection of related documents. Additionally, I utilized individual teacher responses from the first interviews to get an initial understanding of HMH implementation facilitators and barriers, gain access to supporting documents, as well as inform my follow-up questions for the subsequent second teacher interview protocols. For instance, an approach cited by one participant as effective was not mentioned by the other two participants, so I then chose to ask a question related to this approach with the other two participants. Additionally, these second interviews helped me determine the significance and/or application of any documents that I had collected, thus allowing me to gain a more comprehensive and accurate set of data to analyze for my study (Carter, 2014). I conducted these follow-up interviews within two weeks of the first teacher interviews to allow for a more natural dialogue through a continued conversation.

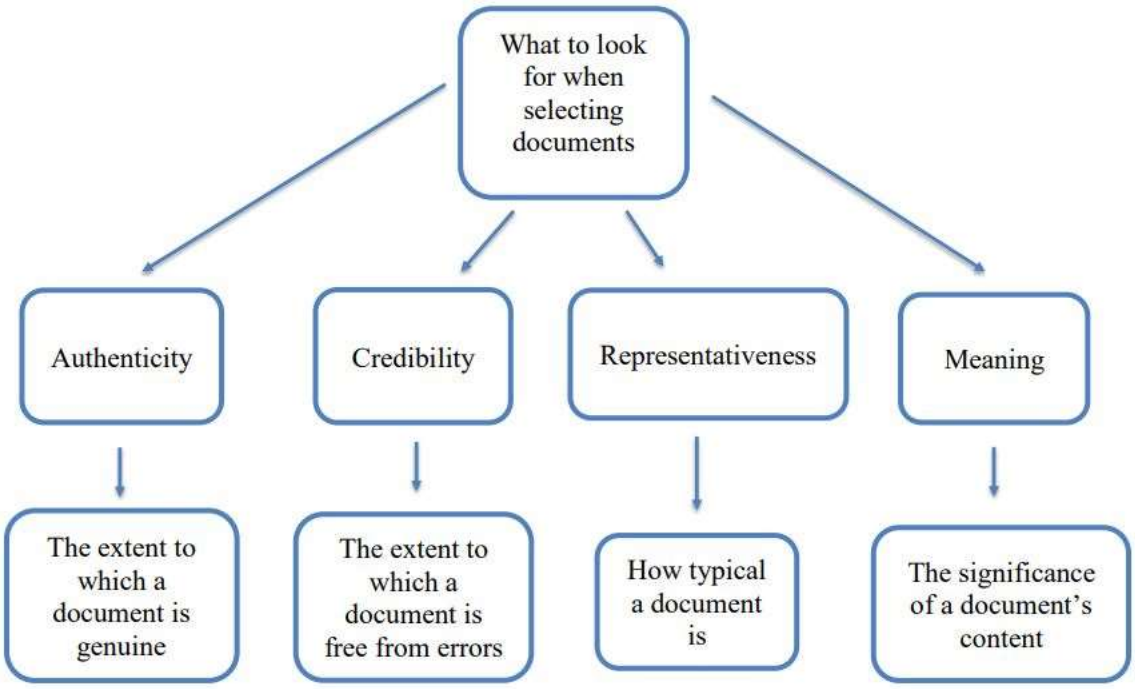
Documents

I selected the documents for this study based on the quality factors that I identified within the qualitative research literature (Figure 3.2). All documents that I acquired were either publicly available or provided by participants with the permission of the research site and ranged in

creation dates between 2017-2025 (which captured the original HMH adoption through current implementation). Described below are the types of documents that I encountered during my research.

Figure 3.2

Document Selection Flowchart



Copied from H. Morgan (2022)

PLC/School-Based Meeting Agendas

As part of my research application with RPS, I outlined my intent to obtain meeting agendas from the teacher participants in order to study how teacher planning time related to the

implementation of the *HMH Into Reading* program. Meeting agendas took the form of running notes kept electronically, printed agendas, and online collaborative workspaces (e.g. Canvas).

Committee Notes and Guiding Documents

I was provided with electronic access to meeting minutes, notes, and both public and non-public guiding documents created by RPS leaders during the initial and ongoing adoption of HMH. This category also includes agendas and action items from the RPS School Board adoption of HMH, and School Board facing staff presentations.

Professional Development Training Documents

I was given electronic access to documents related to the initial and ongoing professional development offerings created by school division change leaders related to the HMH program. Documents within this category included slide decks, teacher handouts and resources created both internally and those published by third parties and used by RPS staff for teacher training purposes. Documents that were utilized in division-wide PD as well as school-based PD are both included in this category.

Curriculum Maps and Pacing Guides

To study the alignment between the HMH resource and the scope of what my teacher participants were expected to teach, I obtained RPS curriculum maps from the study participants for the area of ELA. ELA curriculum maps are typically locally created and include units and topics of instruction, related Virginia Standards of Learning, and the associated methods of

assessments. Curriculum maps provide a visual matrix of the components of an instructional program and how they fit into the instructional blocks allocated for ELA each day.

Curriculum maps have been defined as:

> …the alignment of learning standards and teaching—i.e., how well and to what extent a school or teacher has matched the content that students are actually taught with the academic expectations described in learning standards—but it may also refer to the mapping and alignment of all the many elements that are entailed in educating students, including assessments, textbooks, assignments, lessons, and instructional techniques (*Curriculum Mapping*, 2013).

Additionally, I acquired pacing guides from the RPS change leaders. Pacing guides include time-bound expectations for what teachers are expected to teach, with which resources, and measured through what assessment (Hemmler et al., 2024). The pacing guides I acquired for this study were electronic documents that included hyperlinks to curricular resources, RPS assessments, and various other teaching resources.

Instructional Materials

The instructional materials that I studied included both student-facing and teacher facing documents that spanned a variety of learning targets. These materials included "official" *HMH Into Reading* resources as well as teacher-created and locally created resources (including assessments, slide decks, and worksheets). By studying these artifacts, I was able to look for

alignment between the HMH program and its actual use among my participants. This allowed me to better understand teacher instructional behaviors in the classroom.

Data Analysis

I analyzed the data I gathered from all sources following a consistent and systematic approach. I followed Hays and Singh's (2011) qualitative inquiry collection and analysis methods, which included reducing data, writing analytical memos to inform ongoing data collection, organizing texts, coding data, identifying themes and patterns, revising *a priori* codes, and developing a corresponding main narrative. I analyzed data as I gathered it in an effort to inform my future data collection and interview topics with my participants. The allowed me to get a more comprehensive understanding of participant responses and experiences (Morgan & Nica, 2020).

Using research memos helped me document the emergence of themes in my data analysis and provided a written record of my iterative revisions to the *a priori* codes within my codebook. These memos took form of brief dated notations, entitled "Researcher Note," that I tagged within the MAXQDA qualitative data analysis system alongside the relevant data. These notes included three basic components: summary of data being referenced, connections or interpretations, and action needed/next steps. These research memos allowed me to capture areas requiring follow-up questions, responses needing triangulation, conflicts and commonalities in responses, and emerging themes. Additionally, when I discovered connections between the data I collected and my theoretical framework, I also captured these through these memos. This provided me

reference points to refer to later in my findings, helping me ensure that "a-ha" moments I discovered were not forgotten.

I utilized a naming convention system for referencing all the interview transcripts and documents I collected and analyzed for this study. Interviews were coded with the following format: [Type: ChgLdr or Tchr]_[First Initial]_[Last Name]_Int_[Interview Number], Pos. [line number]. For example, a change leader named Jane Doe's statement on line 51 would be referenced as: ChgLdr_J_Doe_Int_1, Pos. 51. Documents were coded with the prefix "DOC" and the title of the document. For example, if I collected and analyzed a school newsletter entitled "The Buzz," it would be referenced as: DOC_The Buzz. If a document title required me to anonymize it to protect the identity of a participant or my study site, I replaced it with a non-impactful pseudonym or removed those details.

Coding Procedures

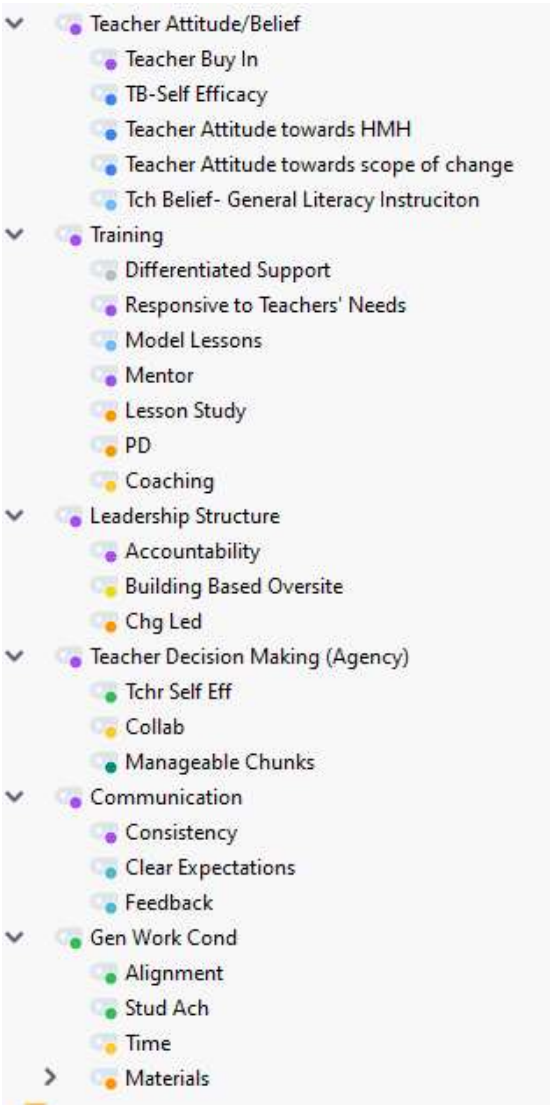
To prepare to analyze the data I collected, I began by creating *a priori* codes based on the literature I reviewed and the Rogers' framework (see Figure 1.1). Using descriptive coding, I identified an initial set of deductive codes (Appendix C) that I expected to encounter prior to conducting my interviews based on the literature reviewed (Patton, 2002). These codes included the conditions identified in the literature found to affect change adoption--as well as the key conditions outlined within Rogers's theory. Having these codes established, I used them for an initial analysis of my semi-structured interviews and document analysis.

After the initial analysis using these codes, I sorted my data based on my *a priori* codes and re-analyzed it to establish additional emergent codes. This process, described as first and "second cycle coding" by Saldana (2018), allowed me to discover additional layers of coded text through deeper ongoing analysis. As each iteration of coding and recoding took place, I was able to create a code book that better captured my participants' responses more accurately and provided me with a useful framework for interpretation.

My initial codebook contained 21 codes, and this was then expanded to include 37 codes to better represent my participant responses and supportive documents. After multiple rounds of coding and recoding, a total of 832 coded segments of data from participant interviews and document analyses were identified. Incorporating the analytic memos that I wrote during data analysis and transcription, I grouped the codes into seven categories: Teacher Attitudes/Beliefs, Training, Leadership Structure, Teacher Decision Making, Communication, and General Working Conditions (see Figure 3.3). I then analyzed the coded segments within each new category and determined initial themes that were descriptive of the emerging findings. Through additional iterative thematic analysis, I determined three unique themes that were descriptive of the coded data and accurately aligned with the emerging themes noted in my analytic memos.

Figure 3.3

Final Data Code Organization (Created in MAXQDA 7.0)



Interview Analysis

Ortiz (2015) states that, "… interviews allow the researcher to explore a topic in a way that yields rich data impossible to obtain through surveys, document analysis, or observation" (p. 47). With that goal in mind, I analyzed transcripts from the interviews in my study for patterns. Saldana (2018) states that the first round of data analysis should begin with researchers searching for emerging patterns, "...organize and group similarly coded data into categories or 'families' because they share some characteristic—the beginning of a pattern" (p. 9). I used my initial *a priori* codes for the first categorization of the interview transcripts and noted specific statements and responses indicating alignment with my codes through meta-tagging within the MAXQDA program. As themes and patterns began to emerge, I recorded them using analytical memos to document my thought process as a researcher. As additional subcategories emerged through my iterative analyses, I added additional *a priori* codes to better capture participant responses and document contents.

Document Analysis

Bowen (2009) defines document analysis as, "a systematic procedure for reviewing or evaluating documents—both printed and electronic (computer-based and Internet-transmitted) material" (p. 27). Using document analysis allows researchers to draw upon multiple sources of evidence to seek convergence or corroboration among findings (Bowen, 2009; Maxwell, 2009). As summarized by Merriam (1998), "Documents of all types can help the researcher uncover meaning, develop understanding, and discover insights relevant to the research problem" (p. 118).

I initially categorized documents based on their original purpose in five broad categories: training materials, teacher-created resources, HMH resources, meetings, and other. After my initial categorization, like the interview transcripts, I also applied *a priori* codes within MAXQDA for each document to assist me in determining eventual thematic patterns among the data (Bowen, 2009). For organizational purposes, I logged each document collected on the Document Analysis Intake Form (Appendix D). My use of analytic memos allowed me to capture additional anecdotal information and note connections between participant interview responses and supportive documents.

Analyzing for Themes

According to Mason (1994), the use of *a priori* codes to organize and analyze qualitative data through cross-sectional code and retrieval methods, is appropriate for case study research like this study. Mason contends that this method offers a systematic overview of the scope and frequency of codes and aids researchers in defining themes, even if they do not emerge in an orderly way. To be clear, the frequency of codes was not the sole indicator of a potential theme's emergence in my analysis but instead served as an indicator of areas requiring me to apply a deeper level of parsing. As noted by Maxwell et al. (2009), "Such categorizing makes it much easier for you to develop a general understanding of what is going on, to generate themes and theoretical concepts, and to organize and retrieve your data to test and support these general ideas" (p. 21).

I utilized tools within the MAXQDA Qualitative Data Analysis program to organize and code data collected in this study. This software provided the structure for me to organize

participant data with assorted colors, codes and symbols while also allowing for embedding of research memos within different data sources. Morgan et al. (2019), compared the features of MAXQDA with the fundamental requirements of qualitative research, as defined by Creswell (2013), and found that the features within this program allow researchers to "more accurately encode [research] content" (p.8). Although MAXQDA now includes the option for "AI Assisted Coding," I did not employ this feature in my data analysis.

Ethical Considerations

My geographic proximity to the research study site revealed a web of proximal personal and professional connections with my participants. Although I hold no position of 'power' at my research site, there was a possibility that my role as a school principal in a nearby school division may have conveyed an imbalance of power that could affect my data collection (Hays & Singh, 2011). To prevent this, I took extraordinary care in establishing a trusting relationship with each of my participants and ensured that they are aware of their roles and rights within the study, as well as the anonymity I attributed to their responses.

When I first communicated with my participants, I explained the nature of the study, level of confidentiality with their responses, and the safe storage of collected data to each participant. Prior to their participation, participants were given multiple opportunities to ask questions regarding the design and structure of the study and will be informed clearly that their participation was voluntary. All participants were informed that the interviews and data I collected were solely for the purposes of this study, and that I would not share identifiable data with any school division employees. Additionally, I ensured that all interview transcripts and

data sources were only labeled with participant pseudonyms, and true identities for each participant were stored separately from the data sources in a secure UVA One Drive account.

Trustworthiness

Lincoln and Guba (1979) developed four criteria to evaluate the trustworthiness of a qualitative study: *credibility, dependability, confirmability*, and *transferability*. In 1994, they added a fifth and final criterion: *authenticity* (Cope, 2014). They consider *credibility* to be the method in which researchers interpret and represent the views of the participants and data they collect within their studies. By clearly outlining methods of data collection and participant engagement, and by keeping clear records when reporting participant data, Lincoln and Guba contend that credibility can be increased. In my study, I strived to communicate the views of my participants with credibility through the use of clear interview protocols with the absence of leading questions and direct quotations for clarity. Additionally, I asked confirming questions of my participants to ensure that I did not infer their responses inaccurately.

Dependability, as defined by Polit and Beck (2012), refers to how consistent the study data would be across similar contexts. Although all settings are different, I designed this study with the goal that the participants I selected were common representatives of typical elementary school teachers, and the curricular questions I asked were specific enough to be applicable in other districts.

Polit and Back (2012) define *confirmability* as the notion that data represents the participants' actual responses and not the views of the researcher(s). By clearly describing the

methods in which my research proposal findings are distilled (the iterative coding and thematic analysis), I created a roadmap for the reader of how I arrived at my findings. Additionally, I explicitly state within this chapter my positionality and role as a researcher for a reader to consider.

Houghton et al. (2012) described *transferability* as the ability for a study's findings to be applied to a different site than that of the researcher. Although my study's limitations state that the findings will not be generalizable, I am aware that readers may attempt to apply them to their own contexts. With this in mind, I made a conscious effort to describe the participant selection criteria and study contexts in enough detail to ensure that any potential transferability is constrained to appropriate conditions.

The final area of trustworthiness, *authenticity*, refers to how "faithfully" researchers convey the feelings and emotional response of their participants (Polit & Beck, 2012). Thus, the more descriptive my findings are, the more accurately I can convey the thoughts, feelings, and perceptions of my participants to the reader. By having accurate transcriptions, asking appropriate follow-up questions for clarification, and by ensuring that my *a priori* coding process is iterative and exhaustive, I maximized the accuracy of both my data collection and data analysis.

Researcher Role and Positionality Statement

Marsh and Furlong (2022) contend that all researchers must practice "self-knowledge," awareness of their ontology and epistemology, and acknowledge the impact that their views of the world and knowledge may have on one's individual lens. According to Takahashi and Araujo (2019), ontology can be seen as one's view of the world and determination of reality, it is a "theory of being" regarding our social systems. Epistemology focuses on one's assumptions around knowledge, and how one may make sense of the world (Crotty, 1998). In a sense, ontology focuses on the nature of what is being observed and epistemology focuses on how we can study it (Ritchie et al., 2003).

In terms of my own paradigm, I find that I land more centrally in the realm of a pragmatist. Dewey threaded the needle between post-positivism and constructivism with pragmatism, as noted by Morgan (2014), "In this philosophical system, post-positivists claim that the world exists apart from our understanding of it, while constructivists insist the world is created by our conceptions of it. For Dewey, these two assertions are equally important…." (p. 1048). In essence, pragmatism incorporates both the lived experience of people and the measurable world around them as evidence to be considered during research.

Although I do not discount the impact of constructivists' views of individuals creating their own versions of the reality they experience, I also believe that education contains some measurable, controllable, and comparable variables we can also study across settings. Because one of the goals of educators is to improve measurable student outcomes for students, as a pragmatist I have learned to incorporate both the daily contexts that I, and those around me, work

in when negotiating their beliefs and the actions of working in a school. I know that everyone I encounter each day has experienced a different set of experiences than I have each day, and our worldviews may not be the same. However, I also believe that the areas of similarity between us are likely substantial and can be leveraged to improve outcomes for all students in our schools.

My aim of this study was to gather as much detail as possible about both the factors that supported teacher instructional change as well as the contexts in which those supports were delivered. As an experienced practitioner, I am aware of the vast differences between different public schools. I do not believe that any school is a perfectly controlled environment where study inputs and results can be replicated, yet by capturing rich descriptive detail on the diverse contexts that I studied (alongside the supportive approaches for teacher change) I hope that my work informs school leaders regarding teacher instructional change within similar contexts.

I acknowledge that my role as a researcher was also that of a practitioner, and my professional experience and resulting belief system likely impacted how I interpreted the data collected in this study. Having served as a public-school educator for nearly 25 years, and a school principal for 16 of those years, I have regularly participated in some level of implementation of various curricular resource changes and instructional innovations at my school sites. These experiences have informed my practice and helped me develop my own priorities when supporting a purposeful school change. My experience also has reinforced my belief that teachers themselves are the most powerful and potentially impactful factors in students' potential for success. My work as a researcher aimed to identify better ways to leverage

the potential benefits of an instructional innovation in a way that effectively and realistically supports teachers in better serving their students.

Chapter Summary

The methodology I outlined in this chapter employs a descriptive case study to understand the conditions that led to the successful implementation of the *HMH Into Reading* program in Ridgetop Public Schools by three participants deemed as "Successful HMH Implementers" by RPS literacy leadership staff. Using interviews and document analysis with thematic coding, I aimed to answer the following research questions:

1. What lessons can be learned for Mountain Valley Public School's literacy instruction by studying one other school division's successful HMH implementers?

    1a: What do the successful HMH implementers perceive as the key conditions that affected their investment in the literacy program?

    1b: What conditions, after the initial program implementation, do successful HMH implementers and division staff believe led to the ongoing use of this resource and continued improvement in their teachers' classrooms?

    1c: What teacher perceptions of this program, do participants believe, were impacted during the implementation process, and do they believe that those perceptions changed over the course of implementation?

The chapter described my study's data sources, including semi-structured interviews and documents, from creation and piloting to collection and analysis. The interview protocols that I employed were based on Brenners' (2006) work, started with grounding questions to establish context and relations, while also allowing for dynamic and topical conversations. I conducted a total of nine interviews with both Change Leaders and Successful HMH Implementers. Documents were selected based on quality and relevance, covering the period of initial implementation to now.

My data analysis process followed a systematic approach guided by Hays and Singh's (2011) methods. The *a priori* codes I used were based on literature and Rogers' framework, with further analysis revealing emerging and additional codes that helped me developed my main narrative. My 21 initial codes grew to 37 codes and were grouped into seven overarching categories, leading to three unique themes through my iterative thematic analysis.

Chapter Four: Findings

The purpose of this capstone project was to explore the conditions that support mandatory teacher change during a literacy program adoption. In order to capture the various factors impacting teaching change, I conducted interviews with three change leaders who supported the studied adoption, along with three teachers who changed their literacy instructional approaches as a result of the mandatory program adoption. Additionally, participants provided documents related to our discussions to assist with triangulation of responses and increase my own clarity regarding the data that I collected.

The following research questions guided the work in this project.

1. What lessons can be learned for Mountain Valley Public School's literacy instruction by studying one other school division's successful HMH implementers?

    1a: What do the successful HMH implementers perceive as the key conditions that affected their investment in the literacy program?

    1b: What conditions, after the initial program implementation, do successful HMH implementers and division staff believe led to the ongoing use of this resource and continued improvement in their teachers' classrooms?

    1c: What teacher perceptions of this program, do participants believe, were impacted during the implementation process, and do they believe that those perceptions changed over the course of implementation?

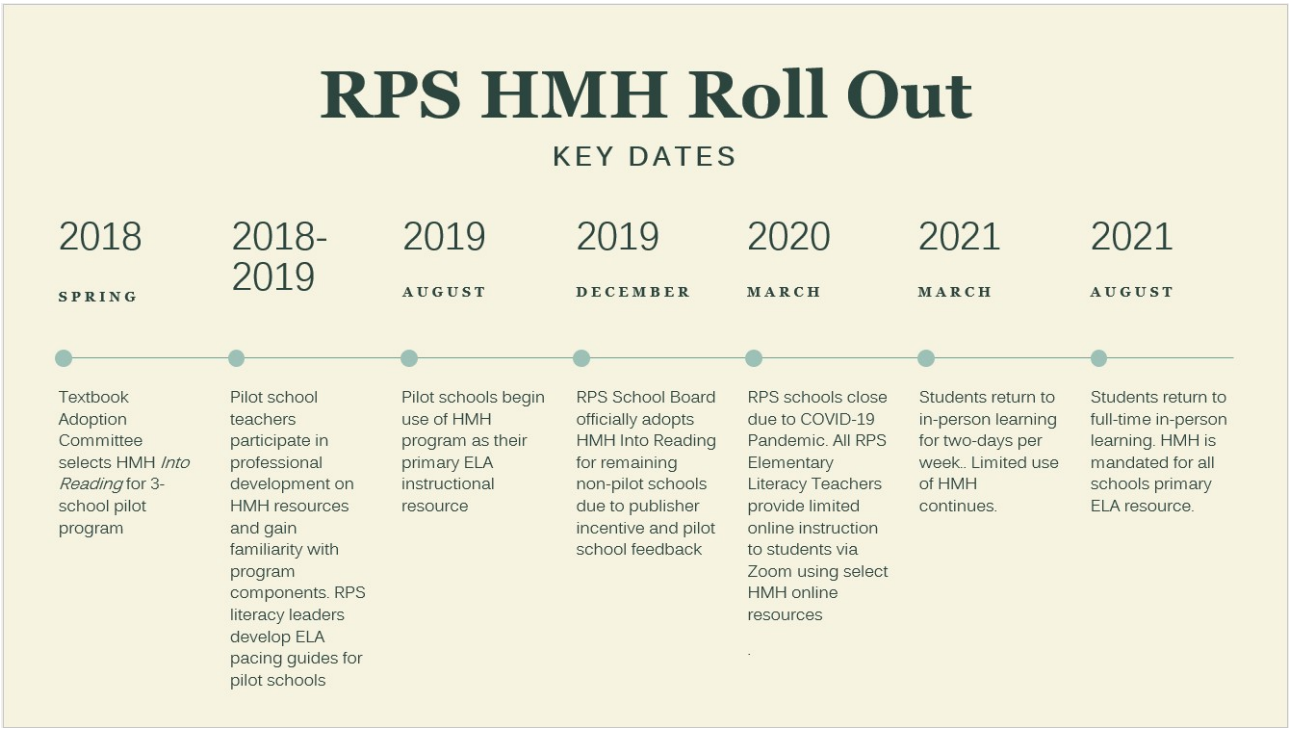
In this chapter I present a descriptive case study of Ridgetop Public Schools and the key personnel who oversaw the mandated literacy program implementation. I include the relevant supportive data gathered from my participants, as well as relevant documents, to add rich description and justification for the ideas presented. I aim to clearly illustrate the factors and conditions that my interviews and documents revealed as being perceived as being impactful by the study participants. I then provide a rich, descriptive summary of the cross-cutting themes that emerged from my analyses, embedding insights into how this study's findings support and contrast the research I discussed in the literature review. Finally, I note the connections between these findings and my theoretical framework.

Ridgetop Public Schools HMH Adoption and Implementation Plan

Ridgetop Public Schools initially adopted the *HMH Into Reading* program (HMH) as a pilot program at three selected schools for use beginning in the fall of 2019 (see Figure 4.1).

Figure 4.1

RPS HMH Implementation Timeline



Prior to the adoption of HMH, the primary resources used to support literacy instruction in RPS consisted of the *Benchmark Reading Program,* the *Lucy Calkins Units of Study: K-5 Writing*, and various word study programs. Student achievement data (as measured by Virginia Standards of Learning Assessments) prior to the adoption of HMH revealed that RPS lagged behind the overall state proficiency rates in nearly every student membership group (see Table 4.1).

Table 4.1

2017-2018 RPS SOL Reading Pass Rates (Percentage)

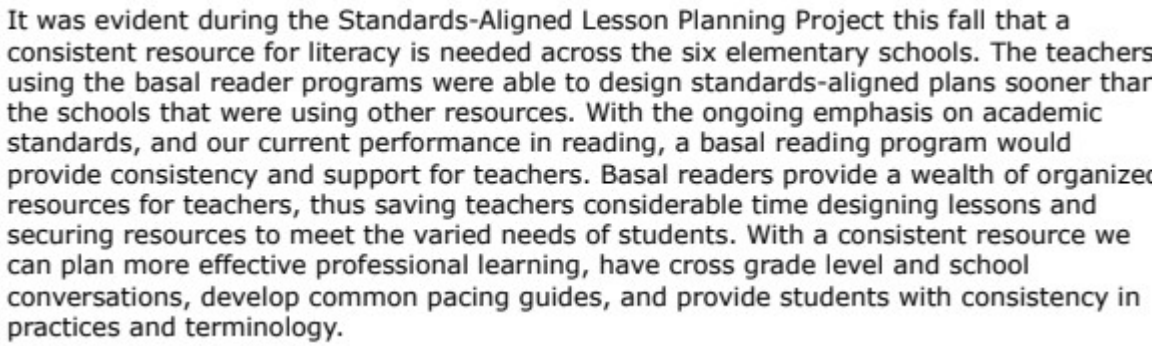
Membership Group	RPS (Diff)	Statewide
All Students	71 (-8)	79
Black Students	50 (-17)	67
Econ. Disadvantaged Students	54 (-12)	66
English Learners	56 (-14)	70
Students w Disabilities	33 (-15)	48

The HMH program was adopted through a year-long (2017-2018) formal textbook adoption process which occurred in RPS every five to seven years. The previous textbook adoption for elementary English Language Arts (ELA) instruction, *Benchmark Literacy*, took place in May of 2013. The 2017-2018 HMH Adoption process involved division staff and community members (including teachers, central office staff, parents, and local community groups including the NAACP). Each group participated in an extensive evaluation process of materials provided by ELA textbook publishers.

The HMH program was ultimately adopted because of its high scores on an RPS staff-created program evaluation rubric that revealed strong alignment between HMH, the Virginia Standards of Learning, and Science of Reading research-based approaches to language arts instruction. The rationale presented to the RPS School Board for the program's adoption was also focused heavily on the need for consistency in language arts instruction across the district (see Figure 4.2).

Figure 4.2

RPS School Board Meeting HMH Adoption Agenda Item Background


It was evident during the Standards-Aligned Lesson Planning Project this fall that a consistent resource for literacy is needed across the six elementary schools. The teachers using the basal reader programs were able to design standards-aligned plans sooner than the schools that were using other resources. With the ongoing emphasis on academic standards, and our current performance in reading, a basal reading program would provide consistency and support for teachers. Basal readers provide a wealth of organized resources for teachers, thus saving teachers considerable time designing lessons and securing resources to meet the varied needs of students. With a consistent resource we can plan more effective professional learning, have cross grade level and school conversations, develop common pacing guides, and provide students with consistency in practices and terminology.

(DOC_RPS SB Agenda Dec 2019, p. 1)

Although the HMH program included a comprehensive writing component, school division officials did not definitively commit to using this portion of the program immediately or in the future due to their prior adoption of the Lucy Calkins "Units of Study: K-5 Writing" Writing Program.

> Based on the success of our launch of the Calkins "Units of Study" Writing Program in 2018, we are piloting the use of the Houghton Mifflin Harcourt into Reading program (supplemented by other resources) (DOC_RPS Archived Equity Info_ 2019-20, p. 2).

The initial rollout of the HMH program was intended to be a two-year phased approach. The use of a pilot plan was chosen by RPS academic leaders because it allowed school and division staff to negotiate the expected growing pains of learning a new program as well as study how to best support teachers and schools in its use. In February of 2019, division literacy leaders

provided a 60-minute overview training for teachers at the three pilot schools, which included RPS-created slides regarding the program's components and various articles for teachers to read regarding evidence-based literacy instruction. Participating schools were also provided with sample kits of the HMH program (the same kits used by the textbook adoption evaluation teams) in the Spring of 2019 to explore the materials and gain familiarity with its printed resources. There were no expectations for the use of HMH during this time.

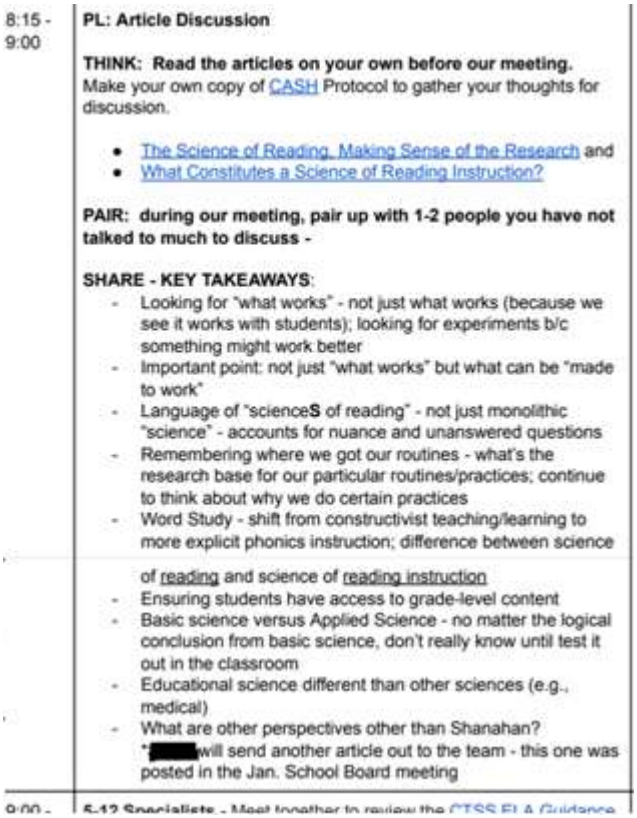
When teachers at the pilot schools returned for the 2019-2020 school year in August 2019, they attended professional development sessions offered by both RPS staff and professional trainers (contracted through HMH) to review the program's materials and how to access them online. Teachers were given individual logins to access online materials as well as the printed program resources, including teacher and student resources. Although RPS had longstanding pacing guides in place using the existing ELA resources, RPS leaders provided pilot schools with updated pacing guides that incorporated the new HMH program materials.

The updated pacing guides for the pilot schools were different than those used at the non-pilot schools, as they reflected the pacing included within the HMH program as well as cross curricular connections to stories and units that aligned with social studies and science standards. The pacing guides that RPS officials shared were web-based, so they could remain dynamic and be updated by RPS literacy staff based on teacher feedback and staff's increasing knowledge of the program. The pacing guides at this time allowed teachers to continue to use the *Lucy Calkins* program for writing or to choose to use the writing component included in the HMH program.

Throughout the fall, division level instructional coaches and building-based reading specialists attended weekly team professional learning community (PLC) meetings to support planning and data analysis related to the HMH program's use at the pilot schools. The coaches and reading specialists at the pilot schools met regularly (at least twice monthly) to discuss common challenges and areas for success among the HMH schools, and to plan supports for these schools during program implementation (see Figure 4.3).

Figure 4.3

Reading Specialist Team Sample Agenda



8:15 - 9:00	**PL: Article Discussion** **THINK: Read the articles on your own before our meeting.** Make your own copy of CASH Protocol to gather your thoughts for discussion. • The Science of Reading: Making Sense of the Research and • What Constitutes a Science of Reading Instruction? **PAIR: during our meeting, pair up with 1-2 people you have not talked to much to discuss -** **SHARE - KEY TAKEAWAYS**: - Looking for "what works" - not just what works (because we see it works with students); looking for experiments b/c something might work better - Important point: not just "what works" but what can be "made to work" - Language of "science**S** of reading" - not just monolithic "science" - accounts for nuance and unanswered questions - Remembering where we got our routines - what's the research base for our particular routines/practices; continue to think about why we do certain practices - Word Study - shift from constructivist teaching/learning to more explicit phonics instruction; difference between science of reading and science of reading instruction - Ensuring students have access to grade-level content - Basic science versus Applied Science - no matter the logical conclusion from basic science, don't really know until test it out in the classroom - Educational science different than other sciences (e.g., medical) - What are other perspectives other than Shanahan? *[redacted] will send another article out to the team - this one was posted in the Jan. School Board meeting
9:00 -	5-12 Specialists - Meet together to review the CTSS ELA Guidance

(DOC_2022-2023 RPS Reading Specialist PLC)

These supports included team and building-based professional development on components of the program, reworking classroom schedules to match the timing constraints in the school with the program requirements and providing teams with opportunities to see model lessons of teachers using HMH. Building administrators at the pilot schools attended and participated in PLC meetings and provided operational and professional development support in coordination with coaches and reading specialists.

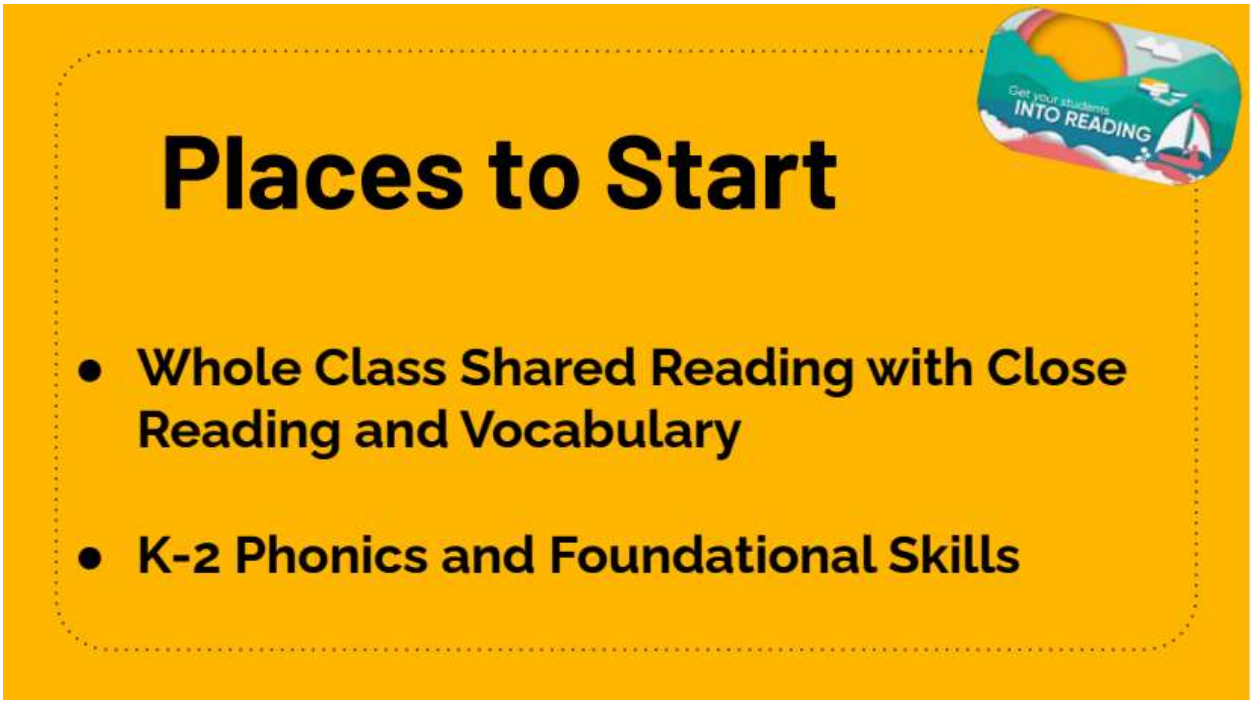
The RPS HMH roll-out plan included having the remaining elementary schools begin to use HMH in the Fall of 2020. The RPS School Board subsequently purchased the HMH program materials for all remaining RPS schools in December of 2019 for future use based on positive feedback from pilot schools and a sizeable early purchase incentive by the publisher. However, the phased implementation plan was thwarted in the early spring of 2020, when the Covid-19 pandemic shuttered schools and shifted learning for RPS students online for the remainder of the school year and through March of 2021. When online learning began later that year, the pilot model was abandoned, and all K-5 ELA teachers were told to use select *HMH Into Reading* online components for their daily ELA instruction.

Although all elementary literacy teachers across RPS began using HMH resources at this time, the use of HMH during distance learning was limited to accessing online books, vocabulary lessons and comprehension questions included with the program. Teachers at both pilot and non-pilot schools received online training by RPS staff on accessing HMH materials and the use of these specific subsets of lessons within the comprehensive program (see Figure 4.4). Due to the constraints of online learning, teachers were limited to 20-40 minutes of reading instruction per

day and focused their efforts on student engagement with the selected program components, and therefore, did not have training or exposure to the majority of the program.

Figure 4.4

Online Instruction Training on HMH



(DOC_ELA Implementation Guide)

Supportive professional development for RPS staff during online instruction was delivered weekly throughout the pandemic and was focused on a variety of topics other than literacy instruction including online pedagogical resources and techniques, various subject area resources, and social emotional supports. Professional development on HMH specifically was limited to pre-teaching vocabulary for class-wide online stories, and the use of comprehension questions to check for student understanding.

In May of 2020, a K-5 Implementation Advisory Team was founded by the Pk-12 Literacy Coordinator and met monthly in preparation for full HMH implementation when students returned to full-time in-person learning. This team included teachers and administrative

representatives from both pilot and non-pilot schools, reading specialists, instructional coaches and RPS executive leadership staff. This group began its founding meeting by answering three core statements and their sub questions: *Where we are now*, *how we will get there*, and w*here we want to be* (see Figure 4.5).

Figure 4.5

K-5 Implementation Advisory Team Original Agenda

Clarifying Questions:

Where we are now How will we address things we pushed out that we not do not want to include now? How can we figure out where our teachers are? How can we figure out where our students are?
How we will get there How do we spiral back to what we've already done and keep moving forward (with regard to new people coming in)? What kind of data will we use to inform us? How do we make PL align with the needs of teachers and students and keep it going? How do we support new teachers coming in? What systems of support will we have in tier one?
Where we want to be How do we define expected progress in goal 4? How do we incorporate student choice in the framework? What is our definition of Culturally Responsive Practices? How do we look at literacy with regard to other content areas? (so we aren't looking at our world in isolation) Is there a systematic way to stay up to date on current and best practices in reading instruction? What are the data sources we'll use to determine where we want to be? How do we measure increased instructional capacity of teachers in goal 3?

(DOC_RPS Division Literacy Plan, p. 1)

This team also updated the RPS Division Literacy Plan with four overarching goals (see Figure 4.6). These goals served as the framework that the literacy team used for all future training and curricular decisions at the school division level.

Figure 4.6

Division Literacy Plan Overarching Goals

1. Map a coherent progression of content, instructional practices, and identified resources rooted in the VSOLs and evidenced-based literacy instruction that grow every reader from PK-12th grade.
2. Build a strong elementary foundation in language comprehension and word recognition skills so that students can access grade level, complex text.
3. Increase instructional capacity of every teacher and leader through sustained professional learning that leads to improved student learning outcomes.
4. In addition to strong Tier 1 instruction, provide a tiered system of support to intervene early with targeted tiered literacy interventions for students who don't make expected progress with strong Tier 1.

(DOC_RPS Division Literacy Plan)

At their monthly meetings, these goals were repeatedly referenced and used as a fidelity check by this team as they updated pacing guides to reflect lessons learned during the brief pilot program, planned professional development for teachers and building leaders, and trained coaches and reading specialists in all aspects of the HMH program to build internal expertise. The group prioritized program components based on teacher feedback from the pilot program and students' needs displayed during the pandemic. The pacing guides they created continued to allow for school choice in the area of writing, as well as portions of phonics instruction and whole class reading. The team authored an ELA Strategic Implementation Plan with specific deadlines for each component required (see Figure 4.7).

Figure 4.7

ELA Strategic Implementation Plan

Goal # 2	Design and implement an ELA Curriculum and Instructional Block that shows teachers how to organize their instruction and time across the week so that teachers...			
Evidence of Success	• Prioritize the critical components of literacy instruction aligned with the science of reading • Embed tiered intervention in k-2 for foundational skills (and 3rd for 21-22?) • Know how to use scaffolding strategies to teach readers with more complex/richer text regardless of the child's reading ability • Students have access to opportunities to practice fluency and build stamina			
	Strategies	Who	By When?	Status
1	Gather a team of teachers to do this work during curriculum week.	LC	Apr 2021	Complete
2	Create samples of the expected ELA block by grade level illustrating how teachers should organize their time (including intervention time). Plan for roll this out during pre-week	LC + Curr team	June 2021	Complete
3	Develop a comprehensive "level 1" PL plan (see below) Part of the "level 1 essentials PL" will include a component on the literacy block, how to organize it and the components to be included.	LC	Aug 2021	Complete
4	Observations and feedback from teachers, coaches, and admin on the structures Ongoing tweaking and revising based on student need and staffing	LC, specialists, coaches, admin	ongoing	ongoing
5	Recommendations for revising the structures and PL through teacher survey	LC + RLT	March 2023	Complete
6	Determine what revisions to pacing guide, and instructional block need to be made and make them	Curr Team	June 2023	

(DOC_RPS PK-5 Strategic Implementation Plan)

Prior to the conclusion of the 2020-2021 school year, all elementary ELA teachers attended a virtual training on the components of HMH led by the Pk-12 Literacy Coordinator. This training included reviewing the organization of the HMH program, ensuring understanding of the non-negotiable components to be used for instruction and assessment, and introducing the pacing guides (see Figure 4.8). Additionally, instructional coaches (based at each building but supervised centrally by the Pk-12 Literacy Coordinator) walked all teachers through the first

module of instruction for each grade level and then modeled an HMH lesson for each grade level team.

Figure 4.8

Spring 2021 Introductory Training

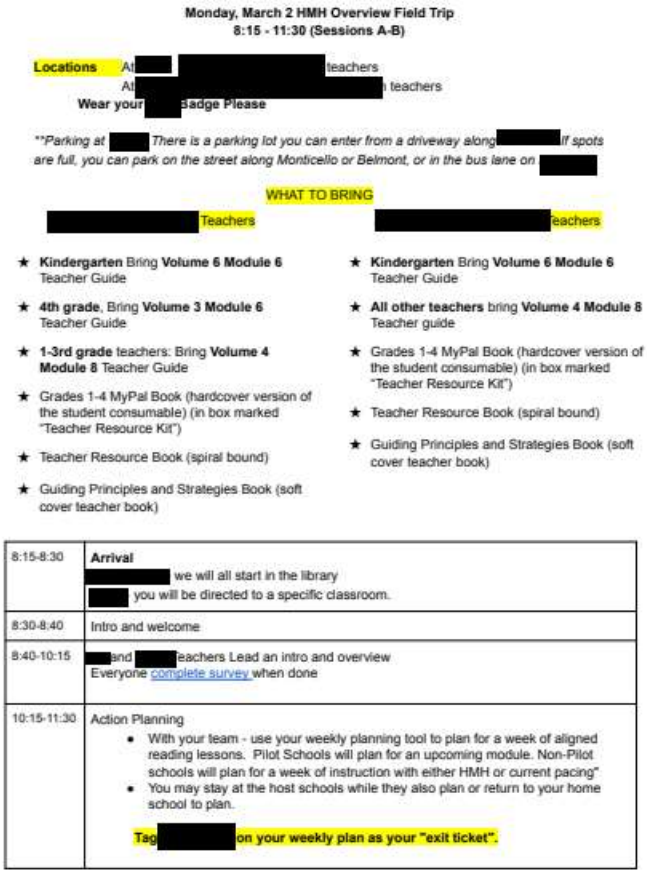
(DOC_HMH Component Overview Training)

In the fall of 2021, all K-5 teachers attended a variety of professional development sessions delivered by both RPS staff as well as building level staff. Professional development in ELA instruction was divided into three 1-hour parts, each focused on a different portion of the HMH program and RPS pacing guides. These sessions were delivered by either the reading specialists or instructional coaches that were assigned to each school site.

Additional training sessions were held three times during this first full implementation year for all non-pilot school staff (and new teachers to RPS) that were hosted by pilot sites, where teachers familiar with the resource led demonstration lessons for new HMH implementers. These PD sessions included opportunities for planning, debriefing the model lessons, and targeted professional development by coaches and reading specialists based on the work of the K-5 Implementation Advisory Team (see Figure 4.9).

Figure 4.9

Mid-Year (2021) HMH Component Overview PD



Monday, March 2 HMH Overview Field Trip
8:15 - 11:30 (Sessions A-B)

Locations At [redacted] teachers
At [redacted] teachers
Wear your [redacted] Badge Please

***Parking at [redacted] There is a parking lot you can enter from a driveway along [redacted] If spots are full, you can park on the street along Monticello or Belmont, or in the bus lane on [redacted]*

WHAT TO BRING

[redacted] Teachers

- ★ **Kindergarten** Bring **Volume 6 Module 6** Teacher Guide
- ★ **4th grade**, Bring **Volume 3 Module 6** Teacher Guide
- ★ **1-3rd grade** teachers: Bring **Volume 4 Module 8** Teacher Guide
- ★ Grades 1-4 MyPal Book (hardcover version of the student consumable) (in box marked "Teacher Resource Kit")
- ★ Teacher Resource Book (spiral bound)
- ★ Guiding Principles and Strategies Book (soft cover teacher book)

[redacted] Teachers

- ★ **Kindergarten** Bring **Volume 6 Module 6** Teacher Guide
- ★ **All other teachers** bring **Volume 4 Module 8** Teacher guide
- ★ Grades 1-4 MyPal Book (hardcover version of the student consumable) (in box marked "Teacher Resource Kit")
- ★ Teacher Resource Book (spiral bound)
- ★ Guiding Principles and Strategies Book (soft cover teacher book)

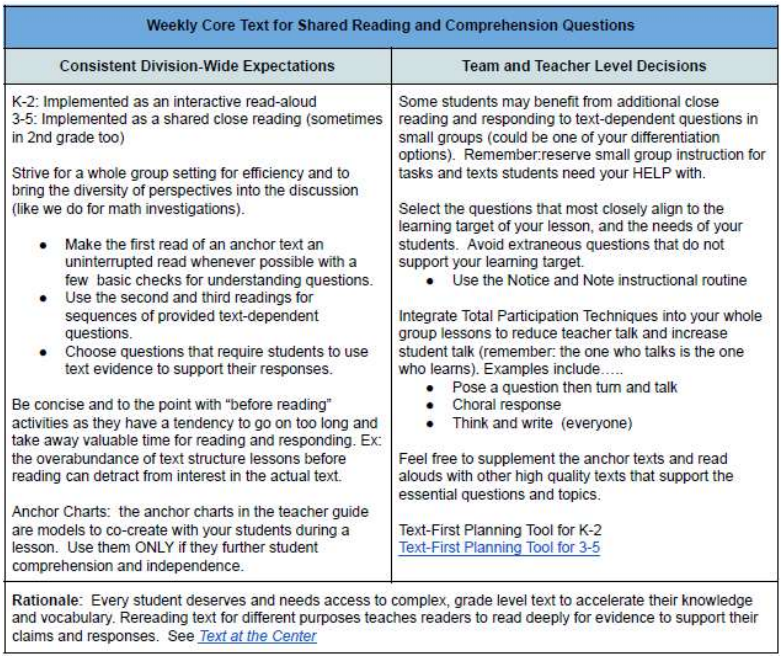
8:15-8:30	**Arrival** [redacted] we will all start in the library [redacted] you will be directed to a specific classroom.
8:30-8:40	Intro and welcome
8:40-10:15	[redacted] and [redacted] eachers Lead an intro and overview Everyone complete survey when done
10:15-11:30	Action Planning • With your team - use your weekly planning tool to plan for a week of aligned reading lessons. Pilot Schools will plan for an upcoming module. Non-Pilot schools will plan for a week of instruction with either HMH or current pacing" • You may stay at the host schools while they also plan or return to your home school to plan. **Tag [redacted] on your weekly plan as your "exit ticket".**

(DOC_March 2 HMH Component Overview PD)

Based on feedback received from literacy specialists and coaches, the Pk-12 Literacy Coordinator and her literacy team moved to further restrict teachers' use of supplemental programs after the first years of the program's full implementation. In the Fall of 2023, division pacing guides were updated to indicate that the use of *Lucy Calkins* for writing was no longer listed as an approved resource, and teachers were expected to use HMH for all literacy instruction. The literacy team also updated the K-5 Implementation Guide to clearly indicate which instructional decisions were division-wide expectations and which were team and teacher level decisions. This guide was also refined to include supportive research as the rationale for each of its components (see Figure 4.10).

Figure 4.10

K-5 HMH ELA Implementation Guide



Weekly Core Text for Shared Reading and Comprehension Questions	
Consistent Division-Wide Expectations	**Team and Teacher Level Decisions**
K-2: Implemented as an interactive read-aloud 3-5: Implemented as a shared close reading (sometimes in 2nd grade too) Strive for a whole group setting for efficiency and to bring the diversity of perspectives into the discussion (like we do for math investigations). • Make the first read of an anchor text an uninterrupted read whenever possible with a few basic checks for understanding questions. • Use the second and third readings for sequences of provided text-dependent questions. • Choose questions that require students to use text evidence to support their responses. Be concise and to the point with "before reading" activities as they have a tendency to go on too long and take away valuable time for reading and responding. Ex: the overabundance of text structure lessons before reading can detract from interest in the actual text. Anchor Charts: the anchor charts in the teacher guide are models to co-create with your students during a lesson. Use them ONLY if they further student comprehension and independence.	Some students may benefit from additional close reading and responding to text-dependent questions in small groups (could be one of your differentiation options). Remember:reserve small group instruction for tasks and texts students need your HELP with. Select the questions that most closely align to the learning target of your lesson, and the needs of your students. Avoid extraneous questions that do not support your learning target. • Use the Notice and Note instructional routine Integrate Total Participation Techniques into your whole group lessons to reduce teacher talk and increase student talk (remember: the one who talks is the one who learns). Examples include..... • Pose a question then turn and talk • Choral response • Think and write (everyone) Feel free to supplement the anchor texts and read alouds with other high quality texts that support the essential questions and topics. Text-First Planning Tool for K-2 Text-First Planning Tool for 3-5
Rationale: Every student deserves and needs access to complex, grade level text to accelerate their knowledge and vocabulary. Rereading text for different purposes teaches readers to read deeply for evidence to support their claims and responses. See *Text at the Center*	

(DOC_RPS K-5 HMH ELA Implementation Guide)

To monitor compliance, identify themes in teacher professional development needs, and support individual teacher needs, building leaders, instructional coaches, and RPS literacy leaders conducted regular classroom walkthroughs to inform the implementation plan. Support for teachers needing assistance with ELA instruction was coordinated through a partnership between building coaches, building administrators, and literacy specialists. Ongoing professional development for veteran HMH teachers continued to be led by building-based coaches and reading specialists, in addition to district-wide onboarding trainings for new teachers. Although rare, any teachers who were found not using the resource for HMH instruction during classroom observations were addressed through directive support by building administrators.

In the next section, I discuss the individual experiences of my participants during the HMH rollout within their various roles, and how their perceptions of the HMH resource changed over the course of the program implementation.

RPS Change Leaders

I initially identified two potential RPS change leaders to interview for this project. Charlotte McCall currently serves as the RPS division Pk-12 Literacy Coordinator and oversees the ongoing implementation of the HMH program across the entire school division as well as supervising the literacy specialists assigned to each school. She has served in this role since Fall of 2023, which is notably after the initial full implementation of this program.

I also identified Ella Peterson, the Coordinator of Professional Learning for RPS, as a study participant. She currently oversees all division professional development (PD) in addition

to overseeing the instructional coaches for the division. During the initial program roll-out, Peterson served as a building principal at one of the schools piloting the use of the HMH program (which was interrupted by the pandemic) and then served as a lead instructional coach during the post-pandemic full division roll-put.

Both of these participants referenced a third change leader relevant to this study, Kathleen White, who is not currently employed by RPS, but who served as the Pk-12 Literacy Coordinator for four years. During White's tenure she oversaw both the pilot and district-wide roll-out of the HMH Program. As she had relevant historical insights into RPS' HMH implementation, she was invited and agreed to participate in this study. In this section I review these change leaders' individual experiences with the HMH program implementation and maintenance, as well as their perspectives on the conditions that supported teachers' use of this program.

Charlotte McCall

McCall is currently in her second year as the RPS literacy coordinator. Prior to this role, she served as a school administrator, an instructional coach, and a classroom teacher. Her first introduction to HMH began when she was serving as an instructional coach at Harris Upper School in 2019, when the school's eight fifth-grade classrooms participated in the HMH pilot program.

The emphasis from the school division leadership at that time was on following the HMH program as written, and McCall's primary role was to assist teams in adjusting their schedules and planning to accommodate this new program. McCall assisted teachers in understanding the

newly aligned pacing guide, the HMH resources, and trying to adjust schedules to accommodate all the required lessons. Additionally, she was tasked with communicating central office staff priorities to teacher teams at Harris related to the pilot program as she, herself, was just beginning to understand the program's requirements and division leaders' expectations for its use.

> We got the materials and unpacked it [sic]. And the word was "fidelity." And I do think that's a curse word when it comes to implementation of a comprehensive program. …it was like looking at it, trying to figure out how do you fit everything in. How do you do all of the parts all at once without a master schedule adjustment? You don't have the big block of time. Most of the time we had 65 minutes, and you can't do it in 65. ...at the same time, we were told the only thing we weren't doing was the writing we were doing *Lucy Calkins Writing*…. So, it was a lot of juggling, and people felt like they couldn't really… collaborate off the plate (ChgLdr_C_McCall_Int_1, Pos. 69).

McCall's duties as an instructional coach shifted rapidly when student learning shifted online during the pandemic. In order to accommodate the very limited online learning schedule that elementary students attended each day on Zoom, the breadth of what skills and content were to be taught was greatly reduced by the Pk-12 Literacy Coordinator, and her role as a coach rapidly became supporting teachers in building competency with a division-selected fraction of the HMH program (in addition to the task of transitioning to online learning). Teachers at Harris were allocated just 20 minutes per day to teach reading, compared to the 65-90 minutes they

were using previously while in person. This reduced time to teach ELA forced the teachers at her school to isolate their new instructional learning with HMH to distinct components.

> But then once we went virtual… we felt better about it because then you knew, okay, I'm only choosing the parts that I can do. Like some of these things you can't do in a virtual setting. So, [the teachers] actually learned some of the components. [We] actually looked at how to do the shared reading in this setting and how to make it beneficial. What are the tools? What do we need to do? …like the foundational skills, focusing on that and breaking that down is this is our area of focus…that really helped because then it was manageable (ChgLdr_C_McCall_Int_1, Pos. 72).

When students at McCall's school returned to the physical classrooms for five day a week learning in the Fall of 2021, her role again shifted to supporting the implementation of all HMH resources, instead of the selected components used during virtual instruction. McCall continued to work with teams in accessing and applying the various components included in HMH while balancing time constraints. Although her familiarity with the HMH program grew along with the teachers over the course of the pandemic, she struggled with not feeling like she was more of an HMH expert as she supported her teams.

> I think the biggest lesson I learned [as a lead coach] was that I needed to be the master… I needed to understand everything completely…so that I could make those decisions about what were the key components, what would be required versus not…and with it being new, I was learning right along with everybody.

> And that's, I think, that's a big mistake. And when we rely on publishers to be that expert that guides us through that decision making, they're not ever going to say not to do a part. I mean, they'll tell you [that] you have to make decisions, but they're not going to go, "Okay, this one can wait two years. Like, you don't need to do this piece right yet" (ChgLdr_C_McCall_Int_1, Pos. 98).

Although McCall's expertise in HMH was not where she wanted it to be, her teachers' expertise grew quickly. Professional Learning Community meetings (PLC) quickly became teacher led, and McCall's role became assisting teams in problem solving as they grappled with implementing the program. McCall utilized teacher leaders to facilitate these meetings and partnered with division staff in updating pacing guides and instructional resources to support teacher needs.

> We had all new teachers. So, when you don't have a veteran teacher on the team leading those discussions, that's where the struggle is. But that's how I prioritize my time. And I go to some planning meetings instead of PLCs…just because you dig into HMH more. We're making decisions. We're talking about the 'why'. What will it look like? We're doing the rehearsal of parts of it. I can't tell you how many times we sat and practiced going through. What does the foundational skills lesson look like? (ChgLdr_C_McCall_Int_1, Pos. 151).

In 2022, McCall transitioned to her current role as pK-12 Literacy Coordinator, where she oversees the literacy instruction for the entire school division. In this role, she supports literacy specialists based in schools who were supporting many teams like she did as a coach.

Her work also entailed continuing the implementation of the school division's literacy plan. In this role, McCall met monthly with her reading specialists to learn about teacher and student needs and to adjust the support given by her team in response. The program was then viewed as something to be implemented with "integrity" instead of "fidelity," by division leaders. Additionally, the HMH publishers released a structured literacy (phonics instruction) component in 2024 that required additional teacher training and updates to the pacing guide, which she oversaw.

> We did not have the structured literacy component…they had foundational skills, which are the same idea…once they came out with the structured literacy, the pacing and scope and sequence was very different…and I made the change this year, and I was like, "We're using structured literacy," and I bought it for everybody, but they were like, "Wait, we've gotten really good at our foundational skills." And I was like, "Yeah, and we're going to get even better with the with the faster pace." But now they're realizing, "Oh, like, this is this is harder and different," [but] they're doing it. And now we were in my last meeting with the reading specialist [and] are having to adjust the foundational skills of third grade for next year, because the kids are going to come to us with a different preparedness (ChgLdr_C_McCall_Int_1, Pos. 82).

McCall's role became increasingly supportive of teachers who have become experts in the program and setting boundaries for teacher choice within the ELA framework. The training

sessions she conducted for teachers changed to focus on problem solving and leveraging teacher experts to plan how to effectively support students.

> Like, I think the fact that they're so fluent in knowing all of the options and knowing how to make those decisions, I think that's how you know, it's really successful when you can weigh what's good, what's needed and what's not, and what the benefits are and what the impact is like. If you know that thing, you know the program. (ChgLdr_C_McCall_Int_1, Pos. 139).

Ella Peterson

Ella Peterson was serving as a principal during the textbook adoption process in 2017-2018; she and some of her staff members served on the RPS textbook adoption committee. When the time came for the selection of pilot schools, her team was eager to volunteer to test out the program. Although, as part of the pilot implementation, her teachers initially received training in all of the components of the HMH resource, she found that her team's initial instructional footing was grounded almost solely in the comprehension and vocabulary building components of the program.

> I felt like we got really solid that year in implementing the comprehension aspect of it, the shared reading aspect of it which was, you know, a text with vocabulary and discussions. And it was great to have a common text for all of our students…I recall that we made a great effort to make sure that students, you know, all

> students were able to be part of that tier one instruction and be exposed to grade level text (ChgLdr_E_Peterson_Int_1, Pos. 19).

The teachers in her school slowly began to increase their comfort level in planning and using HMH as their sole (except writing) resource for ELA instruction, however they were constantly finding themselves overwhelmed by the volume of resources included with the program. Although PLC teams partnered with her reading specialist and instructional coach for support, her teams' confidence with the resource didn't improve until later that year when the pandemic forced them to isolate areas of focus. The directives that she received as a building leader from the Pk-12 Literacy Coordinator clearly identified specific areas of the HMH program for teachers to use. This enabled her, the instructional coach, and reading specialist, to isolate areas of support for her teachers.

> Trying to teach literacy over a screen and having all of those digital pieces... [HMH] definitely made that more doable. The division literacy lead in our implementation of HMH was very explicit about like the things we will do, the things we won't do, like where teachers kind of have some sort of leniency and say and sort of what it looks like and where, where there's less like where it's sort of expected to be followed with fidelity. I feel like the division kind of consistently has had, you know, given guidance around, you know, the amount of time for literacy instruction and those types of things…that are expected…so I do feel like we had really good guidance…for fidelity [in] utilizing the resource and buy-in because…we had very clear guidance from our division literacy

> coordinator at the time on that. The other thing I will say is, in some ways it was a little bit easier to learn parts of it and the parts that…we were utilizing, like any curriculum, has a ton of pieces to it. Right? And like there was no way to try to do all of that stuff in virtual (ChgLdr_E_Peterson_Int_1, Pos. 20).

As her teachers' experience and comfort with the specific components utilized during Covid improved, they were able to explore and build internal capacity over additional portions of the program.

> We kind of learned certain parts of it…and got comfortable with those. And then I think coming back the next year with, with a full block of time…or when we came back in person, I guess that March, once we had more time and moving into the next year…it was almost as if the Covid year was like a tryout year of using some of the pieces of it and getting used to it. And I mean, it wasn't an optional thing, but, you know, we were able to kind of get used to the resource. And then when it came time to like, okay, we've got our full two hours of literacy instruction. But certain parts of it people already felt pretty comfortable with [HMH] as well (ChgLdr_E_Peterson_Int_1, Pos. 21).

When students returned to in-person learning in March, Peterson's role within RPS changed to Lead Instructional Coach, but she was able to continue to support Harris Upper Elementary teachers in this new capacity. It was then that she noticed that her previous teachers had an advantage over non-pilot schools and could quickly focus on mastering additional components as part of their PLC meetings. As a lead coach, she partnered with the school coach

and literacy specialist to develop instructional goals for each team at Harris and to ensure the training needs required for teachers to meet the goals were met.

> …our PLCs were spent walking through the modules, like we would settle on… do the initial read and then there's like close reads, but there's like different focuses for the close read. And we would sort of settle on which ones are we going to do if there was a ton of vocabulary words, we're selecting the vocabulary words (ChgLdr_E_Peterson_Int_1, Pos. 41).

Peterson's transition in 2023 to Coordinator of Professional Learning for all of RPS allowed her to continue to support the HMH in terms of refinements for existing users as well as structures to train and support teachers new to the program and RPS. She began to identify model classrooms across the district and create opportunities for teachers to observe one another and learn from practitioners successfully using the resource.

> And I want to say there were multiple schools that, you know, teams would come over or individual teachers because they wanted to see what it would look like… that's the beauty of having the common resource (ChgLdr_E_Peterson_Int_1, Pos. 50).

Additionally, Peterson partnered with the Pk-12 Literacy Coordinator to refine communication to teachers regarding expectations for program use and negotiables and non-negotiables based on observations, teacher feedback and PLC discussions. She cited this

communication as key to the consistency that improved the use of the program across the division.

> We can get feedback and we can make adjustments and we…want [teachers] to have some of that flexibility. You want to have some like the loose pieces, but you really want to have clear tights. And I think being communicative about the loose-tights and like…the sort of these are the non-negotiables. This is what this should look like. This is how the block should be divided. This is what the pieces should look like. Having the clear pacing guides, like I think all of the direction…is so critical because if you just adopt something and it's like available for teachers to use, we all know, you know, like some are going to go all in on it, others are going to pick and choose pieces of it (ChgLdr_E_Peterson_Int_1, Pos. 55).

Kathleen White

White's engagement with the HMH rollout spanned both the pilot and full implementation phases (as well as the pandemic teaching in between). She began her position in January 2019, mere months after the textbook selection committee chose to adopt the HMH program; however, she was initially hesitant about HMH being the ultimate program that was selected due to the breadth of the required change.

Around the same time the textbook selection was made, a podcast entitled "Sold a Story" was becoming relatively viral among literacy teachers. Its content was focused on the economic incentives for slow change by reading textbook publishers and the resulting impacts on

classroom instruction and how the balanced literacy reading approach was decades out of step with reading research (*Sold a Story*, n.d.). She saw the timely publication of the podcast as an opportunity to answer the question of "Why this?" held among her and the reading specialists she supervised. She conducted a podcast study group with her entire team (i.e., school-based literacy specialists and instructional coaches) that same month where they dissected the podcast and related literature. This shared experience, and other research into the Science of Reading, led her team to create the RPS Division Literacy plan, which became their guidance document for future decision making.

> So, what we did was we used that podcast to sort of do some visioning together. Yeah, and I had them use [the podcast] to create our vision statement for the division and distill it into like four big goals. And then that drove everything else (ChgLdr_K_White_Int_1, Pos. 36).

The work of her and her team focused on building background knowledge on reading instruction across the entire division, for both pilot and non-pilot schools. Their belief was that it would benefit both groups and their instruction with students equally. They also determined that many of the components needed for effective writing instruction were already included in an existing program within the district, *Lucy Calkins Units of Study: K-5 Writing,* and decided that its use could continue at pilot schools if teachers so desired. Their rationale was that this would be one less component for teachers to manage during the initial adoption and would also not harm students. White mandated that, to better support PLC needs, the decision about writing needed to be made at the building level.

> And so, for that first year I just said to principals, "You decide--it's your building, but it has to be a building level decision. Either everybody's still doing *Lucy Calkins* for writing or you're all going whole hog into HMH." And so, they made that decision. And so, then I would get these teachers who are like, "Okay, I figured this out" (ChgLdr_K_White_Int_1, Pos. 166).

White's team spent the pre-pandemic months also updating pacing guides and creating lessons for teachers to draw from as they gained familiarity with the HMH program. They began to issue explicit directives to pilot schools over the non-use of outside resources such as "Teachers Pay Teachers" and *Haggerty* and incorporated these limitations into the overall K-5 implementation plan. They also began to enroll reading specialists and teacher leaders in the LETRS program, to deepen their understanding of Science of Reading components. Language Essentials for Teachers of Reading and Spelling (LETRS), is a 40+ hour comprehensive course focused on "Science of Reading pedagogy, depth of knowledge, and tools to teach language and literacy skills" (*Lexia Learning Help Center*, n.d., p. 1). Just prior to the onset of the pandemic, her team found itself simultaneously supporting teachers and PLCs, problem-solving unexpected instructional needs, writing curriculum, as well as preparing for an upcoming full roll out across schools.

That March, when the Covid-19 began to close schools, White's team shifted their work to two parallel tracks: supporting online instruction and continuing to prepare for the full roll-out of HMH. Her team's support of teachers during online learning was focused on communicating

explicit expectations for reading blocks, training teams on specific components of HMH, and participating in school-based PLC meetings each week to troubleshoot issues.

Although the lessons being learned from the pilot were potentially limited when it ended prematurely, she and her team began to form plans they felt were responsive to what they had learned during this brief time to support an eventual full roll-out of the program. She knew that training and supporting teachers at pilot schools required a significant amount of preparation, and that expanding this across the remaining schools would be nearly impossible with current reading specialist contracts. She advocated for lengthened contracts for reading specialists to provide defined time to develop professional development for RPS staff.

> The other thing that I did was…I went through the School Board and I got one reading specialist at every building to have an extended contract so that they came five days earlier and they stayed five days later (ChgLdr_K_White_Int_1, Pos. 83).

Prior to students eventually returning to RPS classrooms in the fall of 2021 for a full year of in-person learning, her team began to deliver the professional learning program and teacher communications that they had developed as part of the K-5 Implementation Plan. White's approach at that time was to visit classrooms, observe PLC meetings, monitor student performance data, and meet regularly with her reading specialists to determine needs across the division.

It became apparent to her several months into the full adoption that there were inconsistent levels of engagement across the division that she felt were closely associated with the level of buy-in by the building principals. Other than one school, at which she described the principal as "completely underwater," she learned that by engaging each principal individually and determining preferred communication approaches with them, she was able to create more consistency for teachers at each site.

> I met with every single principal, and I asked, "How do you want me to communicate with you? How can I be helpful? What's happening in your school?" …so that's kind of where I started from that. And I think that helped me to build…those relationships (ChgLdr_K_White_Int_1, Pos. 130).

This first year, White also determined that the delineation between instructional coaches and reading specialists was often not as clear cut as she initially believed. She discovered, through visiting PLCs meetings and observing professional development sessions, that some of the RPS instructional coaches (each assigned to individual schools) and reading specialists (also assigned to each school) had varying levels of comfort with delivering PD as well as varying levels of expertise with literacy instruction in general. Instead of restaffing positions and shifting individuals' roles, she opted to select whichever instructional leader at each site was the most qualified to deliver literacy PD and used those individuals (regardless of title) as the primary literacy support for each school site.

As White and her team gathered teacher feedback and learned lessons from classroom observations and the PLC experiences from coaches and reading specialists, they ensured that

they captured the new supportive structures into the K-5 implementation plan and dynamic pacing guides. Although the initial structures put into place from the original pilot of the program designed by White and her team have not changed, the content of the pacing guides and implementation plan were continually refined by the successor literacy director and her team.

The perspectives of McCall, White, and Peterson on the HMH adoption and roll-out from their literacy leadership positions provided me valuable insights into the decisions and structures put into place in RPS, as well as their perceived impact on teachers' instruction. In this next section, I discuss the experiences of the three teacher participants during this roll-out and share their perspectives on what conditions supported them in their use of HMH that led to them being deemed "Successful HMH Implementers" by RPS literacy leaders.

Successful HMH Implementers

The change leaders I interviewed were asked to assist me in identifying teachers who they deemed to be successful HMH implementers within RPS. As a researcher it was my goal to identify participants who were representative of typical classroom teachers, not necessarily "literacy superstar" teachers or teachers deemed ineffective literacy teachers prior to the program adoption. I ultimately selected three teachers who represented three separate schools and had varying levels of literacy instructional experience prior to HMH adoption. In the following section, I introduce each of these teachers and share their individual experiences with the HMH program adoption and its ongoing use.

Sarah Rodrigo

Sarah Rodrigo served as a second-grade teacher at Barrett Elementary School in RPS during this study. She had a total of 17 years of primary-grade teaching experience and had worked at Barrett since 2022. Prior to this role, Rodrigo taught in Mountain Valley Public Schools (MVPS) for 15 years.

While teaching in MVPS, the division provided resources for literacy instruction included the *Being a Reader* and *Words Their Way* programs, however, expectations for their use were never clearly communicated to her by division and building leaders. MVPS instructional leaders did not provide pacing guides for teachers and instead relied on teachers to decide what resources they felt best suited the instructional needs of their classrooms and Virginia learning standards.

> We were kind of told to try and [teach] with fidelity as much as we could. I mean, there were time constraints and stuff with things, but at least in my grade, we were trying to follow [*Being a Reader*] the best we could when it made sense (Tchr_S_Rodrigo_Int_1, Pos. 26).

This non-formalized approach to instructional expectations by MVPS leaders also applied to Rodrigo's professional learning in that district around literacy instruction. She experienced little professional development related to the use of these resources or literacy instruction in general, "…we did have some PD, but it wasn't a ton. It was more like, just go and try it kind of thing" (Tchr_S_Rodrigo_Int_1, Pos. 30).

After serving as a kindergarten teacher in MVPS for 15 years, Rodrigo was ready for a new challenge and was hired by RPS to teach second grade at Barrett Elementary, starting in the Fall of 2022 (when students returned for the first post-pandemic full year of in-person learning). Although her teammates had some familiarity with the HMH program through online teaching, she entered her classroom with many firsts ahead of her: her first time teaching second grade, her first time working in RPS, and her first time using HMH.

Her initial exposure to HMH was when she attended an RPS professional development session during the 2022-23 new teacher orientation week, where RPS officials reviewed the ELA pacing guide as well as the accompanying resources in HMH. It was then that Rodrigo was also introduced to the literacy specialist supporting her school, who informed her that she would be attending all her PLC meetings related to ELA instruction. Sarah found the comprehensive nature of the district pacing guides a welcome change from MVPS, but the sheer volume of resources contained within HMH to be overwhelming. She relied on her team's familiarity with HMH as she began to plan her literacy blocks and teach her new students.

> Well, I feel like…with HMH, there's so much that was like my big thing when I first went in, I was like, oh my gosh, there's just so much that you can do and just not enough time in the day. So…I relied heavily on my team, like, "What have you guys done in the past?" That kind of thing…[RPS] had great pacing guides. I would try and follow and like, I do remember people saying, "Take pieces of it that you can fit in," and stuff. So, that first year, I really took what my team told me to do (Tchr_S_Rodrigo_Int_1, Pos. 35).

As she built familiarity with the HMH program, she also enrolled in the LETRS course offered by RPS. Rodrigo's interest in this program was piqued by her school's reading specialist, who had encouraged the rest of her team to take the course and felt that it may assist them better understanding the value of the various components within the HMH program. Sarah had learned to value having alignment with her team, and despite being overwhelmed by the magnitude of changes she was undertaking, she opted to add this to her plate.

> So…I was taking the LETRS course. It was, I was looking back--I should not have done that that first year with new grade and new everything. But my team was doing LETRS, and we wanted to do it all together as like kind of a professional development together (Tchr_S_Rodrigo_Int_1, Pos. 37).

During this first year of implementation, Sarah relied heavily on her literacy specialist and team to help her focus on different portions of the HMH program for mastery at a time. Her collaboration with her team, as well as the new professional learning, assisted her in seeing the 'why' behind many of the components contained within the program and prioritizing her instruction.

> I definitely had a bunch of a-ha moments when I was planning phonics. I'm like, "Oh, we just that's why we're doing this because I just talked, I just read about this in LETRS." So, it's definitely a lot of that…or it would help me like tweak something that I think would need to be, you know… I mean, obviously, that's why they chose it (Tchr_S_Rodrigo_Int_1, Pos. 76).

When Rodrigo shared with her coach during her first month of instruction that she was having difficulty completing the entire shared reading lesson as outlined in the pacing guide, she was given the opportunity to observe some of her colleague's language arts lessons and debrief with an instructional coach. This assisted her with her pacing and application of the shared reading portion of the HMH block. Additionally, her team was given regular release time to collaborate and plan, as they do during PLC meetings, for an extended period of time each quarter to review upcoming lessons and instructional resources.

> And then my school, I don't know if it's done throughout the division…but we have like instructional planning days where for like the grade level where she'll get like three subs and then we can there's three second grade classes. So, we take the day and like plan together. And we do a lot of [planning] since HMH is so big (Tchr_S_Rodrigo_Int_2, Pos. 13).

Over the first year, she gradually became more comfortable in the fundamental structure of the program and was able to leverage cross-curricular connections and supplemental resources provided by RPS to enhance her lessons and planning. The initially overwhelming nature of the program began to slowly improve for her, and her confidence in manipulating the program's components to support her overall daily instruction began to improve.

> I definitely remember thinking it was overwhelming and there was [sic] a lot of pieces to fit in in our short amount of time. I think [RPS] has done an even better job with, you know, planning out the year, like pacing out the year. But it did fit well with a lot of, like, the content stuff we were doing…we would align our

> content with…the modules. So, I did like that piece. I'm like a, like a theme girl (Tchr_S_Rodrigo_Int_1, Pos. 60).

Rodrigo's comfort and fluency in following the pacing guide and using the instructional materials within HMH continued to grow over the years, to the point that she began to feel more comfortable selecting different components of HMH where the pacing guides allowed for teacher choice. Additionally, her participation in PLC meetings has increased and she began to actively share her instructional moves and decisions with her team during lesson planning and data analysis sessions.

The HMH program was updated in 2024 to include a structured literacy component, which was then added by RPS literacy leaders into the pacing guide. When this occurred, Rodrigo trusted the process set forth by RPS and started exploring the resource independently over the summer of 2024 prior to any formal training.

> I feel like you have to learn something before you can then mess around with it and change it and stuff. So, now we stick pretty much to [HMH], you know, what the curriculum says (Tchr_S_Rodrigo_Int_2, Pos. 9).

Although Sarah's confidence in using HMH has improved over time, there remained portions of the ELA instructional block that was actively refining to better meet her students' needs.

> I think I'm just more comfortable. I like it. The piece that's the hardest, I think, is…we are still expected to teach, like, small group things, and they don't have a

> ton of what I would consider, like, great resources on small groups, you know, like there's in the manuals, there's a couple of like, here's some independent things they could do or here's some small group, but it's just like these are the Start Right Readers that go with it. And there are some more things now that with the structured literacy…there's lots of materials. But as far as, like putting it all together and planning it all for small groups is still challenging. Still challenging for me…yeah (Tchr_S_Rodrigo_Int_1, Pos. 64).

Stephanie Thompson

Similar to Rodrigo, Stephanie Thompson's experience spanned both Ridgetop Public Schools as well as Mountain Valley Public Schools. At the time of this study, Thompson was serving her first year as the gifted resource teacher at Ayers Elementary School in RPS. Prior to that role, she taught for a total of 11 years in both first and second grade in RPS, MVPS, and District of Columbia Public Schools. During her time in Washington, DC, there was a program required to use for ELA instruction, although it was not similar to HMH. When she arrived in Virginia and began working in MVPS, she found herself having to create her own ELA lessons from scratch.

> When I came, there wasn't…a set curriculum that we had to use, which was different than what I had in DC. So, it was more of like a piecemeal of, like, you could use these programs, but a lot of teachers were just coming up with their own stuff (Tchr_S_Thompson_Int_1, Pos. 34).

She worked closely with her grade-level team in MVPS to develop thematic units of study for her students centered around Virginia Standards of Learning (such as identifying the main idea of a story), rather than a Science of Reading based approach involving both word recognition and comprehension.

> We weren't doing science of reading stuff yet, and it was very different from what we had been doing [now] with HMH, where it was…more like, let's work on main idea and like three weeks of main idea versus that spiral instruction for shared reading. And then it was more of like the whole like, here's the leveled readers for like small group and stuff like that. So…extremely different from what we're what we're doing now (Tchr_S_Thompson_Int_1, Pos. 36).

In 2018, Thompson joined RPS as a member of the faculty at Ayers Elementary School. It was then that she learned that her school would be participating in the pilot program for HMH. Although she had received some scattered professional development sessions on reading instruction while in MVPS, the concept of using a set pacing guide was foreign to her. The idea of less pedagogical and curricular freedom concerned her, but she was excited about the idea of having more resources to draw from to build her lessons each day.

> I feel like a lot of teachers were feeling like they were either like having to come up with everything on their own or using a curriculum that wasn't meeting student needs, and it was just nice to have something that we were all consistently using and sharing resources and sharing things that we were doing (Tchr_S_Thompson_Int_1, Pos. 78).

As a pilot school, all teachers at Ayers received initial professional development sessions by the reading specialist and instructional coaches that following spring. Her school principal then clearly outlined expectations for the HMH use at her school and was explicit in her expectation that no teacher was expected to master every component immediately. School teams at Ayers selected individual components to pilot first and gain familiarity with during the first several modules of the program and provided feedback to the coaches and reading specialists about their needs as they began to use them.

> We were a very gradual [school]. So, we were a pilot school, and Peterson was our principal at the time. So being able to… not feel the pressure to do everything perfectly the very first time, I think, allowed us that freedom to sort of, like, pick and choose and not feel like we had to do everything all at once (Tchr_S_Thompson_Int_1, Pos. 40).

Her grade level team gradually grew more confident in the components of the program and added additional elements to their ELA blocks. This method of teaching reading was much different than the thematic approach that she had previously utilized, and Thompson was constantly encouraged by her instructional coach to trust the research behind the program. Even though she later reflected that they initially prioritized the wrong elements of the program, the limited time allocated for ELA each day required them to make decisions about where to focus their efforts.

> We started with the shared reading piece of things, and we ended up just doing what [the HMH teacher's guide] told us to do for the first module. And then, after

> [the first module], we really went through and we were like, “This didn't work. There wasn't enough time. We need to slow things down. This was aligned. This wasn't aligned.” And so...by module two, [we said], “Okay, what did we like? What do we want to keep doing?” I feel like we in hindsight, we should have definitely started with their, I think they call it “structured literacy” now. It was like their foundational skills piece. In hindsight, knowing what I know now, we definitely should have started with that because we didn't have a curriculum like that…but at the time, that wasn't really the focus. We didn't really understand the importance of that. So, we ended up starting with that, shared reading piece (Tchr_S_Thompson_Int_1, Pos. 46).

When the pandemic closed schools that spring, Thompsons’ team worked with the school reading specialist and instructional coach to assist in selecting components of HMH to be used across the division for remote learning. Due to the limited amount of time allocated each day for reading, her team opted to prioritize shared reading and comprehension, and focused their efforts on selecting texts that they felt were most accessible to students. Although she attended Zoom professional development sessions weekly to support the use of HMH during remote learning, she did not find these to be overly informative or designed to help her meet the changing needs of her students.

After the first year of implementation, Thompson was given the opportunity to work over the summer with RPS staff on updating the pacing guides for HMH in preparation for in-person learning. She found this experience to be very rewarding and responsive to her needs as a

teacher. She has continued to serve on the committee each summer and support the efforts to create pacing guides that are responsive to teachers' needs.

> A lot of us were part of the curriculum development team that met over the summer that suggested [changes], let's suggest like this text over this text. And so, like over the years, the [pacing guide] has sort of suggested this text. And this standard aligns better than like this text. So, we're going to skip that one. So, we had a lot of like exploration at first. And then over the summer [the pacing guide team] really narrowed down like what is working what isn't working. Teachers were able to…fill out surveys. We also tried to align the themes of our shared reading modules. There's like science themes and social studies themes with the unit, the content units, so that like they were reading the text in our shared reading, it was helping them do a science experiment in science, or it was helping them better understand a social studies concept so that it was building that background knowledge. So, we tried to really like align those themes when sometimes they align beautifully and other times they just didn't (Tchr_S_Thompson_Int_1, Pos. 52).

Although the ELA Implementation Guide and pacing guides were explicit in which areas of instruction were open to teachers input versus the expectation to adhere to RPS requirements, Thompson's school team was able to make changes to support their unique circumstances when appropriate.

> …we're meeting with our coach and our principal and, if what the team is saying makes sense and it's meeting our students' needs, then they're able to make some of those like micro changes at the school level that deviate maybe slightly from what is being suggested, but most of the time the pacing is the same and we're doing the same things. It's just we're maybe tweaking an activity to better meet some of the needs of our students…or changing a target because our students need more practice with X than Y or something like that (Tchr_S_Thompson_Int_1, Pos. 56).

In 2021, Thompson and her team enrolled in the LETRS course at the suggestion of her instructional coach. She found this course to be fundamental in furthering her understanding of reading instruction and providing the context she yearned for to understand the various components of HMH more clearly.

> I feel like we adopted first and then we started doing the LETRS training and really understanding. Like, "Oh, crap, this really is so important. Thank God, we're doing it." …so, I think we were kind of backwards, but hopefully like teachers getting that information with the science of reading and then understanding like, "Oh, this is the why!" (Tchr_S_Thompson_Int_1, Pos. 101).

As her individual level of proficiency in using HMH improved, she eventually found herself in more of a leadership role supporting the use of the program. Thompson credited her school's participation in the pilot program as instrumental in allowing her to become proficient in HMH without being overwhelmed. In 2023, she was tasked by her school principal to serve as a

teacher model for new teachers in her school learning to use the program. Although she did not feel like she had mastered every single component of the program, she took pride in being able to help her colleagues navigate the myriads of components in a way that was logical and benefited students at her school.

> Like if you weren't a pilot school, then you did feel like a truck hit you all at the same time. But because we had a couple of pilot schools…we were able to better support teachers as they were sort of onboarding a really dense, heavy curriculum. There's a lot in HMH that I feel like I'm still figuring out.
> (Tchr_S_Thompson_Int_1, Pos. 81).

In 2023, Thompson's team (and several other teachers at other pilot schools) were invited by RPS officials to travel to another Virginia school division that was implementing HMH for the first time and assist with their onboarding. During this visit, Thompson and her team modeled HMH lessons, assisted teachers with lesson planning, and helped orient teachers to the HMH components and to prioritize their learning.

Nicole Franklin

Nicole Franklin has served 25 years in public education in two school divisions: RPS and MVPS. She served for four years in RPS as a third-grade classroom teacher at Moncure Elementary School. Prior to RPS, Franklin also served for 20 years as a teacher in MVPS. Her literacy teaching experience in MVPS and RPS (prior to the program adoption) were flexible.

"…Guided reading books. Okay. Whatever was in our book rooms" (Tchr_N_Franklin_Int_2, Pos. 9).

Although there was no formal reading program expected for her to use in MVPS, Franklin found great value in the ongoing professional development that was delivered by a school-based literacy coach there as positively impacting her literacy instruction. This professional learning influenced her enough so that she decided to earn her Masters in Reading during her time there. She did her best to apply her new learning from her master's program into her literacy instruction but was frustrated by the lack of resources available to her that were aligned with her new learning and was exhausted from piecing together materials for her lessons each day.

She joined RPS in 2021 (mid-pandemic), and her first experience with HMH was during remote teaching. Despite the expectations for the use of HMH during remote teaching being limited to particular components, Franklin found the program to be overwhelming (along with the difficulty teaching any subject remotely in itself).

> How am I going to remember to be able to do this? Like, this is so much, and even all the materials are so awkward. I am…less computer savvy than some other people. So, I was like, "Okay, here's my mini book, here's my vocabulary cards" ... And then I was like, "No, this is not working…I'm clunking around with all this stuff," …so I focused more on like, "This is where I'm going to go, and this is what I'm going to use to be able to get there" (Tchr_N_Franklin_Int_1, Pos. 45).

Franklin attended weekly professional development training during the remote teaching period, where various components of HMH were reviewed by reading specialists and coaches for her to use for the remainder of her online year. Although she found this period of time to be useful in understanding some isolated components of the program, she was hesitant about its implications on her traditional ELA block when students returned to the classroom, “I can't believe I'm going to teach all of this from a script” (Tchr_N_Franklin_Int_2, Pos. 27).

When students returned to in-person learning, Franklin continued to adjust to the volume of resources contained within HMH. Although she found the availability of resources, that she previously had to research and find on her own, a welcome change, she remained overwhelmed by what was expected for her to accomplish during her ELA block,

> HMH speaks to what I was spending hours and hours trying to prepare. So, part of it is, I agree with so much of what it's there, and I am so grateful to have it, even though it was really overwhelming the first year, and that was even with what I had already taught for 20 years, even with the background that I had. There's so much in there…and it was such a big change having somebody hand me a pacing guide that was that detailed and then including all of the pieces that HMH has. It's taken a really long time of us digging in to actually even become close to realizing how much is actually in there (Tchr_N_Franklin_Int_1, Pos. 29).

Franklin found her weekly PLC meetings dedicated solely to instructional planning for ELA to be core to her support in using this program. Initially, these meetings were focused on individual components of the program and understanding how to deliver the lessons within the

timeframes allocated in the pacing guide. Franklin and her team relied heavily on their instructional coach to guide these conversations. The coach was present not just at PLC meetings, but also in Franklin's classroom. She offered feedback to lessons she observed and came to PLC meetings with additional resources and trainings to reflect what she saw across the team during ELA instruction. When her team hit a roadblock, her coach assisted them in overcoming it, and when necessary, modeled the proper use of the program to assist them in their understanding.

> She was there. [The coach] was a part of every PLC. So not only did she support our PLC work, but she knew exactly where we were with pacing. She knew what was happening so she would anytime she wanted or anytime we asked her would pop in…and she would either like, jump right in and co-teach because I felt comfortable with that…or she would sit in and she would be able to give us feedback. So, there was constant support and constant feedback, and it would have been within…the first module. So, within the first month of school that we asked, "…there's so many pieces to this and I don't I feel like I'm missing something because there's so much." They provided coverage for all three of us, and we watched her teach an entire for an hour, and we just took notes on what she was doing. So, we got to see how she broke apart. Like, this is the lesson that she followed. And then this is what it actually looked like…and that was when it was like, oh, okay, we do know what we're doing. Like we're experienced teachers. We got this (Tchr_N_Franklin_Int_1, Pos. 65).

As Franklin and her team's confidence in the initial components of HMH grew, they began to build a more efficient model for lesson planning where components for ELA blocks were distributed among the team to ease the workload of creating weekly lesson plans. Although the team opted to divide up many portions of the lesson, they decided with the coach to always review the module overview and goals as a group to ensure that they were all aligned with overall instructional goals and expectations.

> What we do is, we take a look at the whole module, and [we] do what we call a skeleton framework. So, we know each module has three weeks, and then we look at it. Okay. This day's MAP testing. We got to get this done in four days. This week we have all five days, and we kind of look at how we're going to piecemeal it out across the week. That part we do all together (Tchr_N_Franklin_Int_1, Pos. 49).

During her first year of in-person use of the program, her team provided feedback to the coach that explicit amounts of time for each component in the program would help them better organize their lessons. Her coach worked with the RPS K-5 ELA Implementation team to respond to this request, and the pacing guide was updated to include time-based expectations for each component. As a result, Franklin learned to trust the same pacing guide that caused her initial stress.

> [RPS] broke it down where they were like, "You're doing this for 30 minutes, then you're doing foundational skills for 15, and then you're doing fluency for 15. This is your one-hour block." And it was so concrete. But then we were like, "How do

> you fit that all in?" Because you look at the manual and you're like, "I can't possibly do all of that in one hour" (Tchr_N_Franklin_Int_1, Pos. 68).

Although she continued to participate in RPS professional development sessions, she found the most useful support for her literacy instruction to be at the PLC level with her instructional coach. When the HMH publishers added the structured literacy component in 2024, Franklin and her team received training in a small group during a summer PLC meeting. They worked together on updated plans and lessons immediately in preparation for their use. She credited this elevated level of collaboration and efficiency on the trust inherent in a team bound by the same work. Although her team had not completed the LETRS course, they were constantly reading articles with their instructional coach that provided additional context and research behind the various instructional moves within HMH.

> …and then we would sometimes read some articles and then set a goal for what we were going to do. It was a lot of…I've never experienced this level of PLC work consistently, and I think I really believe it's because of the coach. And now… I'm on my second coach…they know us so well. They're in and out of our classrooms. There is a different level of trust that when I come in, I say this, I know this could be better, but I want some help digging through it. It happens like by, not, maybe not the next week, but the week after that (Tchr_N_Franklin_Int_1, Pos. 99).

Franklin continued to refine portions of her ELA block and later began to leverage the timeline for units within the pacing guide in new ways. Although she consistently followed the

HMH program, she eventually became more comfortable in replacing certain shared reading texts and comprehension activities within the program with resources she believed were more accessible or engaging for her students. Her initial fears about teaching from a script had been alleviated through an increased understanding of the program and its purpose.

> I can totally follow the pacing guide for RPS because I know that however I wiggle my time, I have to be done by Friday. So according to the pacing guide, I am always on track. It's my day-to-day comprehension block that would look a little different than what the HRM manual would tell you… [for example] I couldn't possibly read a story that was that long because those third and fourth grade texts are just too long. So, I wasn't able to get through the story, so I stopped pushing myself to try to do it. And so now I will chunk it into meaningful chunks that whatever that comprehension skill is, I will apply it to that chunk (Tchr_N_Franklin_Int_2, Pos. 21).

Themes

In the following section, I offer three overarching themes that were synthesized from the data analysis of participant interviews and documents. Supportive data within each theme that I did not discuss in detail earlier in this chapter is referenced herein or in noted appendices for clarity.

Theme One: The HMH program contains a robust and vast amount of material that may overwhelm teachers and require the use of "chunking," or purposefully doled out manageable expectations, for teacher's new learning and classroom application.

All participants in this study made mention of the magnitude of the materials included with the HMH program once they began interacting with it. Descriptive words and statements used by participant groups are noted in Appendix E, showing relative alignment between both groups of participants and their views of the program's potentially overwhelming number of materials.

Researchers have found that program adoptions can be impacted by the reality teachers face in the classroom (Hayes et al., 2020). In terms of Rogers' Diffusion Process by Innovation Theory, the initial perception of a change after formal training or communication (beyond previous knowledge) is important. According to this theory, change adopters' decisions to first attempt change must pass the *Persuasion* stage (after *Prior Conditions* and *Knowledge*) (see Figure 1.1), where teachers consider the complexity, compatibility and advantages of the proposed change after their training (Henderson, 2005). Should the change be initially seen as too complex and difficult to attempt, Rogers' theory contends that the likelihood of eventual adoption shrinks substantially. The potential for teachers being overwhelmed by the breadth of this program was anticipated by change leaders in RPS, and teacher participants noted that efforts were repeatedly made to sequence expectations for teacher usage to manageable chunks. I outline below the supportive efforts to break the resource into manageable chunks and create the

conditions that supported to my teacher participants' decisions to change their instructional approaches through using HMH.

Pandemic as a Learning Year

The initial pilot program was impacted by the COVID-19 pandemic as the HMH resource was shifted to an online reading resource for teachers teaching reading remotely. Although participants shared that the professional development and expectations for the program's use during remote learning were limited, multiple participants described the benefits of building familiarity with the program during this period of time.

As summarized by Charlotte McCall,

> But then once we went virtual, then we felt better about [HMH] because then you knew, okay, I'm only choosing the parts that I can do. Like some of these things you can't do in a virtual setting. So, [teachers] actually learned some of the components [of HMH]. They actually looked at how to do the shared reading in this setting and how to make it beneficial. What are the tools? What do we need to do? …like the foundational skills, focusing on that and breaking that down is this is our area of focus. We're all going to do it in 20 minutes, and here's what it'll look like (ChgLdr_C_McCall_Int_1, Pos. 72).

Pacing Guides

RPS change leaders ensured that division pacing guides were authored in a way that were realistic to the time constraints within a literacy block. According to McCall, pacing guides were

co-created by both change leaders in the division as well as classroom teachers over the summer to ensure the expectations were realistic. The pacing guides included clear expectations focused on each component of HMH, linkable state standards, connections to science and math standards, and clear timelines for each objective to be taught, assessed, and retaught. Stephanie Thompson referred to the pacing guide as being realistic and responsive to teacher feedback.

> You figured it out as you got to know it. And then as we got to know it, we started incorporating that into the pacing guide of, like, this text didn't really hit it. Students weren't interested. Let's spend four days on this text instead of whatever [HMH suggested] (Tchr_S_Thompson_Int_2, Pos. 12).

Coaching

Research suggests that the use of an instructional coach can positively impact teacher change (Blanchard et al., 2016), and the leaders supporting an instructional initiative may be principals, coaches and lead teachers (Powell et al., 2010). RPS change leaders repeatedly noted the relative flexibility of which staff members in each school site (either a literacy specialist or instructional coach) served in the role as the primary HMH expert and instead focused on their relative experience over their titles and the person in this role offered significant support to teachers in discerning what portions of the resource to use.

In interviews with RPS change leaders, all three discussed the purposeful use of some type of building-based coach who was thoroughly familiar with the HMH resource as an integral part of the implementation plan. According to the change leaders, coaches' deep knowledge of

the program allowed them to support teachers in navigating the robust number of resources within HMH, a sentiment echoed repeatedly in teacher interviews (see Appendix G). The use of coaches to support teachers in using the HMH resources was noted repeatedly in my document analyses and was a key component of the division level literacy plan in addition to being explicitly discussed at various School Board meetings and budget sessions. The School Board, at the request of the Pk-12 Literacy Coordinator, dedicated additional funds during the initial HMH adoption to support each school having an instructional coach and literacy specialist on staff with an extended contract to allow them time to create and deliver professional development for their staff.

Model Lessons

The topic of offering model lessons as a form of professional learning was not identified within my original review of literature for this study as a supportive condition for teacher instructional change, however, all the teacher participants in this study found this practice to be instrumental in overcoming the substantive nature of the HMH program. In some literature, model lessons are related to lesson studies, where groups of teachers observe the instruction of another teacher. While a lesson study involves teachers providing guided feedback to the demonstrating teacher, a model lesson can also be an approach in which teachers observe a lesson delivered by an instructor in an ideal state for the purpose of wholly or partially replicating in their own classrooms (O'Leary, 2012; Takahashi & Araujo, 2020).

Documents I analyzed indicated that the use of model lessons for this purpose was purposeful and iterative. : Within the "HMH Welcome and Overview" professional development

session provided to all RPS teachers during the teacher orientation week of the full adoption year (August 2021), the slide decks make repeated mention of opportunities for teachers to observe model lessons from colleagues and coaches to further their understanding of the materials within HMH. Indicative of the power of this tool, other Virginia school districts have contacted RPS officials in an effort to identify teachers who could conduct model HMH lessons for their own teachers as they grappled with their own HMH adoptions.

According to McCall, when the structured literacy component of HMH was added to the program, this model lesson approach was again leveraged with success. “We got it in the hands of the reading specialist first… they talked everybody through the first lessons in the in that meeting but then went in and modeled it” (ChgLdr_C_McCall_Int_1, Pos. 158).

Phased Requirement of Literacy Components

Although teacher participants made clear that the use of the HMH program was non-negotiable, two participants did note that RPS officials gave pilot schools and teams the option to initially delay the use of HMH for the writing portion of the literacy block. According to Change Leader Kathleen White, teachers were able to lessen the number of new materials they were expected to master by not initially adopting this portion of the program, “So in that first year [of full implementation], we also just said, if you're using *Lucy Calkins* for writing, keep using *Lucy Calkins* for writing.” (ChgLdr_K_White_Int_1, Pos. 166).

My document analyses also indicated references to non-HMH materials for writing during the first year of full implementation, including the use of *Handwriting Without Tears* and

Lucy Calkins Units of Study: K-5 Writing. This approach was also cited by teacher Stephanie Thompson as a method for lessening the change load in her current school. “We just recently made the shift because…*Lucy Calkins Writing* was an option, but now it's required to do the [HMH] writing piece. I feel like that [change] kind of came last because we were already doing something…and it was very different. The writing piece was very different from what we were doing, so [writing] I feel…shifted last” (Tchr_S_Thompson_Int_1, Pos. 81).

Theme Two: Clear communication from change leaders regarding the program’s use facilitated a shared understanding of expectations.

A notable theme among both participant groups was the evidence of clarity and consistency of expectations regarding this program’s adoption. In this section I explore illustrative examples from the data of the approaches that contributed to this finding. As informed by the theoretical framework, these communication approaches are directly impactful in terms of the *Decision* stage of the framework (see Figure 1.1). In this stage, teachers are initially implementing an innovation and individually determining whether their trial will lead to eventual adoption or rejection of that innovation. Communication during this initial use period (the early stages of RPS’ adoption) was repeatedly noted by both teacher and change leader participants as a factor in RPS’ success with the program. My analyses of documents indicated consistent language in communication including division pacing guides, PLC agendas, professional development materials, RPS English Language Arts Implementation Guide, and the K-5 Literacy Implementation Orientation Webcast. Each specified what components of the HMH resource were required or teacher-decided within each instructional unit.

Clear Expectations for Non-Negotiables

The pacing guides initially permitted teachers to continue to use some prior resources that teachers had familiarity with (such as *Lucy Calkins Units of Study: K-5 Writing*). However, there were also widely used resources whose use was terminated by change leadership. As noted by McCall, there were clear boundaries in which instructional decisions teachers could make. For example, "…kindergarten had *Heggerty* at the beginning, but we pull *Haggerty* away…we have first grade teachers who still wanted to use *Heggerty*, and I'm like, no, it's [not aligned with research] we're not doing that" (ChgLdr_C_McCall_Int_1, Pos. 167).

Teachers shared that RPS pacing guides were the primary form of communication for expectations of the HMH program's use. A benefit of a detailed pacing guide included providing realistic expectations about the breadth and speed of which content is to be taught. Pacing guides provided clarity on the time, resources, and assessments required across the entire school division during literacy blocks. In analyzing pacing guides from several grade levels, there were several components that were standard across these documents: time-bound expectations, thematic organization across subject areas, and clarity around what was optional and what was required.

Professional Development

Professional Development (PD) to support RPS' HMH implementation took a variety of forms, which aligned with the research about targeted PD being supportive of teacher change (Webster-Wright, 2009). When discussing professional learning related to HMH, both change

leaders and teachers referred to formal division-wide training along with informal, small group, and/or building-based teacher training to support teachers. The interviews revealed that many of the PD offerings for teachers were tiered, responding to the differing needs of teachers within their first year within the program versus those who had built familiarity through the program use over time. This aligns with Rogers' concept of the *Decision* stage of an innovation adoption, and how the conditions within that stage may impact eventual compliance and confirmation of the innovation. According to Henderson, the more PD assists in negating the complexity of this stage of adoption, the more likely an innovation like HMH will take place (2005).

Documents I analyzed for this study indicated a focus on future-facing professional development responsive to teacher needs, often run by experienced practitioners. A recurring action item in the agenda used for coaching meeting's was titled, "How do we make PL align with the needs of teachers and students and keep it going?" (DOC_2022-2023 Coaching PLC, p. 21) suggesting that this was a priority among coaches at the division level. Importantly, this centralized approach may explain the relatively consistent support that participants described feeling regarding professional learning, especially in navigating the HMH program guidelines and the realities of the ELA instructional block in their classrooms. "And it's nice to attend PD that is realistic 'I know it says x, y, z, but like, I don't get to all of that… take a deep breath. It's okay that you're not getting to that…here's how we've adjusted things.' So, I think hearing both perspectives is really helpful" (Tchr_S_Thompson_Int_2, Pos. 32).

Alignment Between Schools

Although the teacher participants in this study hailed from three different schools within RPS, their interview responses and documents that they provided yielded a strong sense of alignment among them regarding expectations. The participants noted the importance of these RPS division-wide expectations in our discussions, noting that planning often occurred at a team level, but that there were also additional opportunities provided by RPS to formally interact with teachers from other schools during division level PD and other division-wide meetings.

This consistency was noted by all three change leaders separately as a key driver of the instructional coaching and literacy specialist program. Document analysis of agendas from literacy specialist and coaching meetings (which occurred at least monthly), showed a significant amount of time allocated for these school-based instructional trainers to norm expectations, clarify program component use, and collectively address challenges with implementation occurring across division schools (see Figure 4.11).

Figure 4.11

Literacy Specialist Agenda Sample

9:00-9:30 small groups 10 - 10:15 report out	**Problem Solving Teams from FAQs - Instructional Routines using HMH (purpose - support content squad and implementation, maybe plan ahead to Jan 29 PL)**

Instructional Routine Topic	Name
Foundational skills routines in each grade • how can we tweak it to include the spelling routine from our foundational skills implementation guide • Routine for using decodables KDG - guidance to content squad for prioritizing FS HMH Foundational Skills Implementation Guide	[redacted]
Interactive read aloud routine K, 1, 2 K model - standards based interactive read aloud with HMH text BDA Team reflections on int read aloud in K-2	[redacted]
Shared reading routine 3, 4, 5 Here's our thinking doc	[redacted]
Writing routines (evidence based writing in response to text, and writing workshop) Isabel's session about sentence level writing	[redacted]

(DOC_RPS Reading Specialist PLC)

Program Alignment within Division Publications

The alignment between curricular programs and instructional expectations is an important factor in teacher change (Girardet, 2018). In terms of RPS' adoption of HMH, I was interested in determining the degree to which the teachers perceived that the division-created materials (pacing guides, assessments, professional development, etc.) were in relative alignment with the HMH resources. As noted in Rogers' theory, compatibility is a key component of the *Persuasion* stage, and teacher adoption may be impacted by conflicting messages from RPS leaders and the HMH guidelines.

The change leaders interviewed indicated that they worked purposefully to ensure that all division-created materials were in alignment with one another and the HMH program. McCall even noted that during the initial program pilot, while only three schools were using HMH, her team created a separate pacing guide for the pilot schools that incorporated HMH to avoid any mixed messaging. This alignment was confirmed by both document analyses and teacher interviews. According to teacher Stephanie Thompson, the alignment also contributed to an equitable experience for students.

> I think the consistency among classrooms is huge. You're not getting a different education or whatever experience if you're in so-and-so's class versus so-and-so's class. In regard to the curriculum, the text…it really helped align us not only as schools but as a division as students are transitioning between different buildings. You're going into the second-grade class who's reading the exact same text. You are having the same experience as you are, so I think that has helped that

> consistency wise, it's less like dependent on the teacher and more like, “This is the curriculum we're teaching.” So, it doesn't really matter what matter what teacher you have in a sense (Tchr_S_Thompson_Int_2, Pos. 20).

Bi-Directional Feedback

Feedback, both to classroom teachers from RPS coaches, specialists and leadership as well as from teachers to this group, as a tool to support the program adoption was noted across participant groups. The change leaders pointed to feedback sources such as teacher discussions during PLC meetings (which were attended by coaches and specialists who reported back to them at their regular meetings), teacher surveys, classroom observations, and summer teacher curriculum writing institutes as being influential in how they supported teachers. Change leader Ella Peterson shared that this feedback not only strengthened the program’s implementation but also was seen as a supportive structure by RPS teachers, “Throughout the process, I feel like there was a great desire to, to want to get feedback from the teachers. What's working, what's not, like what are we doing” (ChgLdr_E_Peterson_Int_1, Pos. 67).

Participants received feedback centered around both individual observations of their instruction as well as coaches and specialists’ responses to their feedback during PLC meetings. According to teacher participant Rodrigo, observing teacher literacy lessons had been an established practice in RPS since the HMH program adoption, “…that's an ongoing practice through the [division]…they have different days where they check in and observe in the buildings and stuff. Those are really fun when your superintendent comes and observes” (Tchr_S_Rodrigo_Int_1, Pos. 111). Although she expressed anxiety about certain leaders

observing her lessons, she also found the observations to be “not judgy” and leading to supportive changes or professional development that was useful for her and her team.

Instructional coach and literacy specialist responsiveness to teacher feedback was noted by Nicole Franklin as extremely supportive. “So, if we're looking at something and something didn't make sense and we want resources or we want more information, we usually get it at PLC by that next week” (Tchr_N_Franklin_Int_2, Pos. 7). Franklin credits this quick turn-around for teacher feedback as an ongoing essential ingredient for the program’s implementation, as it allowed her to not become overburdened by researching how to address a challenge within the instructional resource.

> …As classroom teachers, we kind of drop the ball because then we're moving on. And it's like with the best of intentions, I just, I know I need to do this better, but I've also got to keep moving on, and I don't have the time to find what I need or find a video or find an article or something. So, I feel like that kind of behind-the-scenes work has made a huge difference (Tchr_N_Franklin_Int_2, Pos. 9).

Theme Three: Opportunity for teachers to leverage their professional expertise in making planning and instructional decisions, within the confines of the program, led to increased teacher buy-in and program use.

Teacher agency was not a topic that originally emerged during the literature review for this study, yet it appeared repeatedly during the data analysis of the teacher participant interviews. Within interviews with RPS change leaders, the concept of teacher choice was not

embedded in the roll-out plan to purposefully ensure teachers felt agency, but instead to assist in teachers chunking their learning and application of the new content. However, according to the teacher respondents, the success of this implementation was partially due to these opportunities for teacher choice. In this section I review areas within the analysis that revealed opportunities for teacher decision making within the RPS HMH implementation and its possible impact on teacher change.

Opportunity for Choice within ELA Curriculum

For instance, the pacing guide offered several HMH resources as options for many of the standards taught (such as which core stories to read). Rodrigo noted, "…my team and I will go through and say, this goes really well with like the writing we're trying to do is like a mentor text. So, let's definitely make sure we do this…or this even goes with content, you know, really well. So, let's do this" (Tchr_S_Rodrigo_Int_2, Pos. 11).

Thompson also noted increased teacher agency among her team after completing the initial instructional units in HMH,

> And then after that we really went through and we were like, "…this didn't work. There wasn't enough time. We need to slow things down. This was aligned; this wasn't aligned." And so, we were able to sort of like module two, be like, "Okay, what did we like? What do we want to keep doing?" (Tchr_S_Thompson_Int_1, Pos. 46).

This use of teacher choice was explicitly outlined in the HMH ELA Implementation Guide that hyperlinked directly to the grade level pacing guides. Within this guide each required curricular skill was outlined and included "Consistent Division-Wide Expectations" for its instruction, as well as "Team and Teacher Level Decisions."

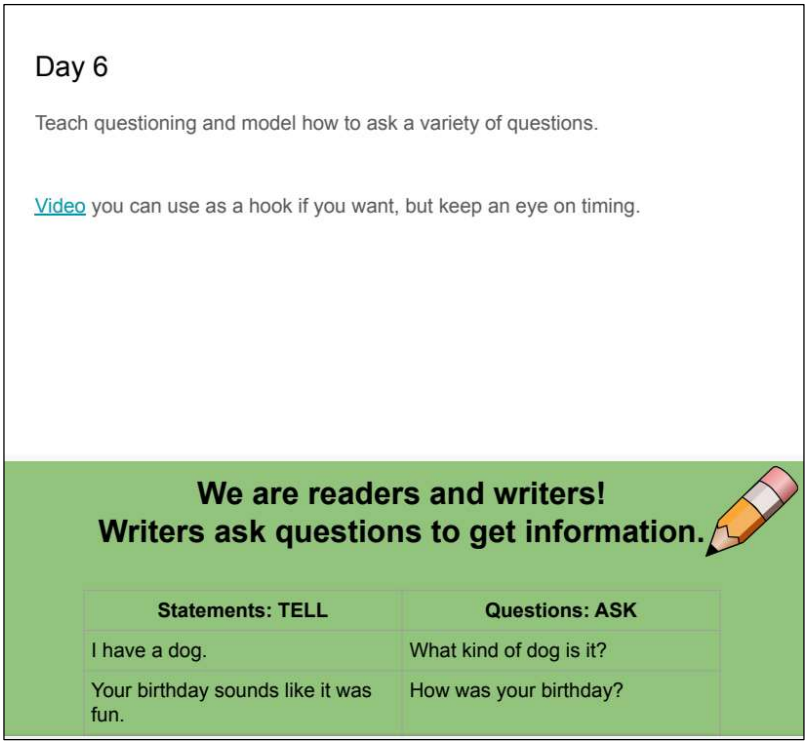
Teacher Collaboration

RPS prioritized formal teacher collaboration and team instructional decision making through unencumbered planning time across grade levels and the use of the PLC structure for instructional planning and decision-making. Teacher collaboration (specifically the use of PLC meetings), as well as release time for teacher planning, have both been found to be supportive conditions with teacher change initiatives (Leana & Pil, 2014; Thompson et al., 2004). The use of PLCs among grade levels was a pre-existing norm in RPS, and this structure was later leveraged to support the HMH implementation process. The use of PLCs for instructional decision making as a supportive condition of HMH implementation was repeatedly referenced among participants and study documents, as noted in Appendix F.

In reviewing sample PLC agendas provided by teacher participants, it was evident that instructional decision making was a normed practice and an expectation at these meetings. Instructional plans created through the PLC process, which incorporated both pacing guide expectations and teacher-decided components were also provided to me and illustrated how this collaborative approach to decision making yielded actionable results based on teacher ownership (see Figure 4.12).

Figure 4.12

Example of PLC-Created Instructional Material



(DOC_Module 3 Literacy 2024)

Building-Based Decision Making

Autonomy was not limited to individual teachers or PLC teams during the HMH roll-out but also happened at the building level. The pilot program implemented prior to the pandemic included initial training and familiarity with the HMH program that the non-pilot schools did not experience. Additionally, the use of HMH for writing instruction was not mandatory during the initial implementation in an effort to ease the burden of the program adoption for teachers. As noted by Frankin, "…some schools were different where some schools didn't adopt the HMH writing right away, whereas our school did" (Tchr_N_Franklin_Int_1, Pos. 158).

Beyond the initial chunking HMH instructional changes, teacher participants each described additional supportive conditions that were decided at the building level that they found helpful, including additional time for planning. According to Rodrigo, “And then my school, I don't know if it's done throughout the division, but we have like instructional planning days where for like the grade level where she'll [principal] get like three subs…” (Tchr_S_Rodrigo_Int_2, Pos. 13). This concept of time as a beneficial supportive condition has been noted by various researchers (Mee & Mee, 2013; Powers & Musgrove, 2020), and although this time was not provided by RPS as a whole, the building-level decision to include it was likely supportive of this instructional change.

Rodrigo also noted that some professional development offerings in her school were unique to the needs of the population of her students, who received limited exposure to literacy during the pandemic and required additional scaffolding and support to access the grade level content. Schools within RPS had a range of demographics, and additional support for schools based on these unique needs likely supported alignment between the instructional asks of the teachers and the needs of the students. This may have contributed to the compatibility of the program under Rogers’ *Persuasion* stage.

Chapter Summary

Through thematic analysis of the data that I collected through participant interviews and document analysis, I identified three themes that address my study's research questions. Change leaders in Ridgetop Public Schools recognized that the district's adoption of the *HMH Into Reading* program would be a substantial undertaking for their teachers. The program's substantial size, and the required change to existing teachers' instructional practices, created the potential for teacher resistance to this instructional change. Although teachers in this study found the program adoption to be challenging, the supportive structures put into place by RPS leadership ultimately led to their successful use of the program.

The program's initial adoption was conducted through a pilot model at limited RPS schools, which was disrupted by the COVID-19 pandemic in the spring of the adoption year. At that time, all schools began to use portions of the HMH program to support their online ELA teaching. Whether through the pilot model, or by using limited portions of the HMH program during remote teaching, teachers were able to gain familiarity and experience with discrete portions of the program and learn its contents in chunks rather than immediately in its entirety.

When teachers across RPS began to use the program in their physical classrooms, the division utilized clear communication protocols, such as pacing guides and implementation plans, to ensure teachers were aware of expectations and which areas of the instructional block were negotiable versus non-negotiable. RPS leaders also solicited teacher feedback through multiple means to inform their program roll out and teacher support systems. The use of building

level coaches and specialists to support teachers as they navigated the program increased teacher confidence in using the program during the initial stages.

The experiences of my participants, as outlined in this chapter, provide a rich description of which structures they found to support their use of the HMH program. The recommendations that I provide in Chapter 5 will apply the themes identified from my data analysis in an effort to inform the literacy leaders in MVPS as they support their teachers during their own HMH roll out.

Chapter Five: Recommendations

In response to the Virginia Literacy Act, school division leaders in Mountain Valley Public Schools (MVPS) adopted the *HMH Into Reading* program as their primary resource for English Language Arts Instruction. Aware that MVPS teachers' use of the previous resource, *Being a Reader*, was scattered and inconsistent, MVPS leaders developed a teacher-training and support program with the hopes of increased teacher program use and, eventually, improved student achievement results. Although this adoption was MVPS staff's first use of the HMH program, there were other school divisions in Central Virginia with experience adopting the HMH program, including Ridgetop Public Schools (RPS), that possessed knowledge that could inform and strengthen the MVPS program roll-out.

This descriptive case study involved semi-structured interviews of three RPS literacy change leaders and three teachers deemed "Successful HMH Implementers"' as well as document analyses, related to the overarching research question "What lessons can be learned for Mountain Valley Public School's literacy instruction by studying one other school division's successful HMH implementers?" While recognizing the limitations of transferring the experiences from the RPS adoption directly to MVPS, this study did isolate themes that contributed to teachers' eventual successful use of the HMH resource that may inform the adoption in MVPS. In this final chapter, I review the applicability of the themes to the MVPS adoption process and offer specific recommendations for MVPS leaders to consider as they continue their HMH adoption process.

There were a variety of structures, conditions, and training sessions implemented by RPS staff that teachers and change leaders perceived as being impactful to their success with HMH. It is important for leaders to deeply understand both the magnitude of required instructional change as well as the context that classroom teachers work in each day. In this study, teachers consistently reported that they engaged with HMH implementation most successfully when they felt its substantial requirements were realistically paced and when they had a sense of agency surrounding portions of the change asked of them. Vähäsantanen (2015) wrote about this concept in her meta-analysis entitled, "Professional Agency in the Stream of Change," concluding, "…the leadership of educational organizations should do more to promote teachers' professional agency, in preference to merely disempowering teachers or regulating their work" (p. 10). My teacher participants found that the sense of control they gained by being able to apply their professional learning around the Science of Reading to their lesson planning, and by having areas of instruction identified as teacher-decided, improved their teams' proficiency with implementing the HMH program.

When leaders have a thorough understanding of the change being asked of teachers within the context that they serve students each day, they can take purposeful steps to build opportunities for teacher decision-making and leverage existing structures to support teacher change. These structures may include the flexible use of building-level staff (regardless of their title or role) to serve as coaches and local experts on the required change and relevant and aligned professional development related to the expected change. Clearly communicating to teachers about aspects of the implementation materials that are to be used without modification,

in contrast to those areas where individuals could modify based on their professional judgment, establishes boundaries of negotiable and non-negotiable implementation components and contributes to the teacher autonomy that leads to increased teacher engagement in the change initiative. Through these approaches, leaders communicate something important to their teachers*: We understand that this is hard, we value your expertise, and we are here to support you*.

Teachers in this study had the opportunity to see skilled literacy educators demonstrate components of HMH in a "model lesson," demystifying the many program components. Model lessons are an approach to teacher training in which teachers observe a lesson delivered by another teacher or staff member and then are led through a series of debriefing questions and discussions to ensure understanding of key program components and to maximize transferability of those components into their own classroom practices (O'Leary, 2012; Takahashi & Araujo, 2020). This study's participants referred to model lessons performed by instructional coaches as being instrumental to their understanding of how to design their ELA blocks in a way where they could fit in all the required content.

Instructional coaching is a highly personalized approach to supporting teacher continuous improvement (Knight, 2012). Coaches are often former teachers with highly successful pedagogical approaches that can be leveraged to support other teachers in their instructional approaches (Knight, 2012). Within RPS, teacher participants considered this role to encompass both formal instructional coaches as well as literacy specialists. They found that these staff members were able to support PLC planning by serving as HMH content experts, assisting in

gathering resources and answering questions quickly, and providing feedback on their lessons. They also found coaches as instrumental in helping them apply their learning from required and optional professional development.

Professional development is defined by Sancar et al. (2011) as "formalized training to develop teachers' existing knowledge and practices to enhance student outcomes and school quality" (p.2). Although professional development can take many forms and cover a limitless number of topics, the PD deemed most effective by study participants was related to both the practical needs of the program (e.g. how to access certain components of the resource online), as well as the theory behind the program's design. Several participants noted that the LETRS training was impactful in broadening their understanding of the purpose of the program components and increased their trust in using them.

In addition to the worth of receiving new training through PD, teachers also found great value in the guidance and requirements from the district being responsive to their ongoing experiences with the resource. Both teachers and change leaders in this study provided examples of opportunities for feedback (e.g. surveys, observations, summer committees, PLC minutes) to inform the K-5 ELA Implementation Plan and instructional pacing guide. Teacher participants shared that they witnessed the selected pacing guide resources regularly changing because of teacher input. Additionally, the participation of coaches and literacy specialists in PLC meetings provided division-wide opportunities for PLC discussions to serve as a feedback mechanism for RPS division leaders. The instructional coaching model, using coaches who were HMH experts,

allowed teachers to receive actionable feedback on their instructional application of the HMH program.

Pacing guides include time-bound expectations for what teachers are expected to teach, with which resources, and measured through what assessment (Hemmler et al., 2024). RPS leaders ensured that their pacing guides could be easily updated with updated content and resources by posting them electronically and having them be easily editable, instead of static paper documents provided to teachers at the start of the school year. This also allowed teachers to follow click paths to the referenced HMH resources, instructional materials, and relevant research and articles. Importantly, these were reflective of the time allotted for ELA instruction each day and the resources available to RPS teachers. These pacing guides also included explicit indicators of which instructional materials were teacher-chosen versus mandatory. This clear communication allowed teacher teams to focus their lesson development efforts on defined areas of the program which increased instructional consistency across the school division classrooms.

Opportunity for collaboration among teachers often takes the form of PLCs, where school team members regularly meet to plan toward continued improvement in meeting learner needs through a shared curricular-focused vision (Hord, 1997). In RPS, teachers found strength through collectively solving problems with their grade level teams during these meetings, isolating areas of responsibility for shared lesson planning, and attending ongoing professional learning together. These meetings were possible because of dedicated planning time each day and additional half-day release time given to them by their building principals in response to unanticipated planning needs when needed.

As MVPS officials continue their first year of HMH implementation across its elementary schools, it is important that they ensure that the conditions, expectations and approaches they put into place to support the use of this program communicate to teachers these same values. The recommendation areas I review next are based on the themes I identified in my data analysis and support the idea of teacher agency while also addressing the potential weight of a complex program adoption.

Recommendations

1. **MVPS literacy leaders should consider identifying successful HMH teachers, or HMH expert coaches/specialists, to model various components of the program as an approach to teacher training.** To accomplish this, MVPS staff must first identify the aspects of the program that would benefit teachers the most through demonstrations and establish a process for determining the level of experience or other qualifications required for the staff conducing the demonstrations. Teachers find a high level of value in seeing expectations demonstrated in real world contexts, and efforts should be made for model lessons to take place in real classrooms where all the challenges and daily realities a teacher faces are present.
2. **MVPS leaders should ensure that each school has ongoing access to staff in a coaching capacity who are experts with HMH resources.** Consideration about potential coaches' knowledge and skills regarding the HMH program should take precedence over their titles, and non "instructional coaches," such as literacy or reading specialists, should be considered for these roles if they are indeed the HMH experts

within a building. Regardless of the title, if teachers have local experts that can provide them with quick responses to questions and access to needed materials, they will feel supported and more likely to continue their learning and application of HMH. MVPS leaders should determine qualifications to identify building level HMH experts and adjust expectations for their roles within the school to allow for this work regularly.

3. **MVPS leaders should carefully consider the professional development selection for teachers regarding this program's use to ensure inclusion of topics that are both theory-based and readily applicable to teachers' practice.** Formal PD programs, such as LETRS, provide training in Science of Reading theory which related directly to the organization of the HMH resource, and should be offered to teachers to establish the foundation upon which HMH was designed. Additionally, timely PD related to the here and now of program implementation should be designed to ensure that as teachers begin using the resource they are provided with training that prepares them for the steps they will be taking in their ELA blocks within a short time. Leaders should prioritize funding this professional learning and establish a flexible professional learning calendar that is reflective of the HMH pacing and responsive to the needs communicated by teachers across the district.
4. **MVPS instructional leaders should ensure that teachers have access to updated pacing guides that clearly communicate to teachers which areas they have professional judgment over and in which areas they must use certain materials.** Leaders should ensure that the pacing guides are realistic to the constraints in which

MVPS teachers operate within each day including the available time and resources. Pacing guides should remain dynamic, so teacher feedback and curricular changes can be regularly addressed through updates. By hosting pacing guides online instead of using static paper documents, they can be easily modified by literacy leaders and designed in a way for simple click paths for teachers, reducing the workload required to find any referenced materials. MVPS leaders should establish pacing guide committees, which include both literacy leaders and classroom teachers, to meet regularly and refine pacing guides. The pacing guide serves as a primary resource for communicating expectations to teachers and must be authored carefully and accurately to prevent teacher confusion and frustration.

5. **MVPS leaders must ensure that teachers are provided with adequate time for planning, training and collaboration.** To do this, they must prioritize regularly (daily) common planning time for each team, as well as give building leaders the ability to provide substantial release time to teams when necessary to support their PLCs with planning, data analysis, or problem solving. At least two to three times a week, this instructional planning time must remain unencumbered and not be seen as 'free time' to pull teachers for other meetings, such as IEPs. To accomplish this, leaders must develop building schedules beginning with this core value, and county leaders should verify that each school has the resources and expertise needed to build such a schedule.
6. **MVPS literacy leaders should develop a system to gather feedback from teachers and teacher teams to inform their on-going program roll-out and demonstrate their**

responsiveness to teachers' instructional needs. Ensuring that teachers regularly receive feedback and support from HMH expert coaches will increase consistency with instructional experiences for students across the division. In order to accomplish this, MVPS leaders should formalize multiple methods to collect this feedback including teacher surveys, the use of teacher focus groups, as well as regular opportunities for building coaches to meet and identify common trends across school division PLC meetings. MVPS should consider being explicit in communicating to teachers the changes they make to pacing guides, professional development offerings, or other structures that are in direct response to this feedback. This will communicate to teachers that their feedback is leading to change and contributes to increased teacher ownership of the HMH program and roll out.

Summary

Mountain Valley Public Schools adopted a literacy program in response to a mandate included within the Virginia Literacy Act. Although MVPS officials were not familiar with the resource when they adopted it, a neighboring school division had been using it for five years and had learned lessons that could potentially be used to support MVPS teachers. Through a descriptive case study, I captured the experiences shared by six participants who experienced the RPS HMH rollout, three from the perspectives of change leaders who oversaw the program implementation and three from classroom teachers who changed their instruction to align with the program. Research has shown that there are conditions that support teacher change, and that modifying the curricular resources teachers are expected to use during their instruction may

impact student achievement. Through thematic data analysis, I identified three thematic findings that captured the conditions deemed supportive by my participants. RPS officials' acknowledgement of the size of the HMH program, and steps they took to mitigate the potentially overwhelming nature of this program, prevented teachers from feeling overwhelmed. Communication from RPS leaders, whether through dynamic pacing guides, professional development sessions, or through building-based coaching, set clear expectations for teachers while also allowing for teacher feedback. Teachers were given opportunities to leverage their professional expertise through explicitly specified lesson-planning decisions, leadership opportunities and ongoing literacy training. As MVPS officials continue their HMH roll out, these are areas worthy of their consideration to potentially increase the likelihood of a successful program adoption.

Limitations

Through a qualitative approach, I had the opportunity to richly capture the contexts of my participants and research site and I was able to triangulate emerging themes through systematic data collection and analysis. This approach allowed me to depict highly descriptive findings that readers should consider before any possible application of my recommendations. It was my goal that this approach maximizes the transferability of my findings and recommendations, however, there are differing division level leadership approaches between my study site and local context that may limit some of this transferability. For instance, teachers in RPS may be more accustomed to "top-down" instructional mandates, whereas teachers in MVPS may have

previously experienced more instructional autonomy (hence the scattered and inconsistent use of the previous literacy resource). This may have limited teacher resistance to the change I studied.

My access to participants for this study was, in one way or another, impacted by whom my study site's liaison identified and provided access for me to contact. Potentially viable participant candidates were excluded simply due to my lack of access or knowledge of their existence. I was very thoughtful in my discussions with change leaders about identifying these candidates with the goal of meeting the research participant criteria I outlined; however, it is notable that some teacher participants were asked to serve as model teachers at surrounding school divisions implementing HMH.

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Footnotes

[1]psuedonym. Billingham serves as an executive-level academic officer for MVPS and oversaw the selection of *HMH Into Reading* for the division.

[2]psuedonym. Swanson serves as an elementary literacy curriculum coordinator for MVPS and is overseeing the implementation of the HMH Adoption for the division.

Appendix A

Interview Protocol: District Change Leader (Interview 1 of 1)

Identifier:

Name:

Title:

Interviewer:

Introductory/Consent Statement:

In order to have a more natural dialogue with you, I would like to create an audio/video recording of this interview that I can later review and transcribe. I will not be sharing this recording with others, nor will it be made publicly available in the future. Do I have your permission to record this interview?

In order to protect your rights as a confidential participant in this study, I am going to read you our consent agreement prior to getting your permission to begin:

As you know, I am a graduate student in the Education and Human Development Department from the University of Virginia. I am conducting a study on factors that support teacher change, specifically in regard to the adoption of the HMH Into Reading program, and I would like to ask you some questions about that.

I would like to record our conversation so that I can get your words accurately. This interview will take about 60 minutes of your time.

There are no known risks to participating in this interview, but if at any time during our talk you feel uncomfortable answering a question, please let me know, and you don't have to answer it. Or, if you want to answer a question but do not want it recorded, please let me know and I will turn off the machine.

There are no benefits to you as an individual for participating in this study; however, your interview responses may help us to learn more about how to support teachers during a mandatory instructional change.

I will do everything I can to protect your privacy. There is always a slight chance that someone could find out about our conversation. I will not use your name during the interview, and your contact information will be kept separately from the recording and notes of our conversation.

Your participation in this research is voluntary. If at any time you want to withdraw from this study, please tell me and we will stop the interview. I will erase the recording of our conversation. If you wish to withdraw from the study in the future, please contact me. All documents that you provide me, as well as the transcripts that I develop from these interviews, will use an identifier in place of your name to protect your confidentiality.

The recording of our conversation will be stored securely on One Drive. The recording of our conversation will be erased once it is transcribed into notes. Only I will have access to the recording and the notes taken during the interview.

If you have questions about this research, please contact me at 571-220-5504. You can also contact my faculty advisor Catherine Brighton at 434-924-1022. If you have questions about research participants' rights, please contact Tonya Moon, IRB Chair, at 434-924-0823.

Now I would like to ask you if you agree to participate in this study, and to talk to me about the HMH Into Reading adoption. Do you agree to participate?

Do you have any questions or concerns before we begin?

Background:

Please state for me your current position.

How long have you been in this role?

What level of experience would you consider that you have in supporting or facilitating instructional change among teachers in your division? *(RQ1a,b)*

Participatory Questions:

What was your role during the initial adoption of the *HMH Into Reading* Program?

I would like to ask a series of questions regarding the initial roll-out of this program. I understand it has been several years since this program began, so if there are any supporting documents you would like to share with me to supplement this conversation I would be most appreciative.

- Describe the timeline for me from the adoption, planning, and staff training to full implementation of the HMH program. *(RQ1, RQ1c)*
- Who (what position) oversaw the adoption program for HMH? Teacher training? Program evaluation?
- Describe for me the conditions the division put forward to support teachers in learning and applying the new content from HMH. *(RQ1, RQ1a,b)*

What are the greatest lessons you learned as a division leader regarding this program's implementation? *(RQ1)*

What conditions do you think your team created to support teachers in adopting this program? *(RQ 1a,b,c)*

How did you initially define success for this program's use? Do you think its adoption has been successful?

What steps have you taken to maintain this program's success/use after adoption? *(RQ1b)*

For this study, I would like to identify six teachers that you and your team would consider to be "successful HMH implementers." HMH publishers have outlined key expectations for fidelity with the program implementation, which include conditions such as 120 minutes per day of literacy instruction, the exclusive use of their curricular materials and lesson guides, and the use of unit assessments to inform instruction. However, you may also have your own definition of teachers you deem successful implementers.

I am most interested in identifying teachers who represent the typical journey a teacher in RPS may have taken with the program adoption. This may include teachers who had to substantially change their literacy instruction as a result of this program adoption, teachers who were initially resistant to this program, and teachers whose understanding of literacy instruction changes as a result of this adoption.

Given these guidelines, or your own individual definition of a teacher who you consider to be a successful HMH implementer, can you assist me in identifying six potential teachers for this study?

Why did you choose these teachers?

Is there anything else you would like to share with me on this topic?

Thank you very much for your time and support with this project.

Appendix B

Interview Protocol: Successful HMH Implementer Teacher (Initial)

Identifier:

Name:

Title:

Interviewer:

Introductory/Consent Statement:

In order to have a more natural dialogue with you, I would like to create an audio/video recording of this interview that I can later review and transcribe. I will not be sharing this recording with others, nor will it be made publicly available in the future. Do I have your permission to record this interview?

In order to protect your rights as a confidential participant in this study, I am going to read you our consent agreement prior to getting your permission to begin:

As you know, I am a graduate student in the Education and Human Development Department from the University of Virginia. I am conducting a study on factors that support teacher change, specifically in regard to the adoption of the HMH Into Reading program, and I would like to ask you some questions about that.

I would like to record our conversation so that I can get your words accurately. This interview will take about 60 minutes of your time.

There are no known risks to participating in this interview, but if at any time during our talk you feel uncomfortable answering a question, please let me know, and you don't have to answer it. Or, if you want to answer a question but do not want it recorded, please let me know and I will turn off the machine.

There are no benefits to you as an individual for participating in this study; however, your interview responses may help us to learn more about how to support teachers during a mandatory instructional change.

I will do everything I can to protect your privacy. There is always a slight chance that someone could find out about our conversation. I will not use your name during the interview, and your contact information will be kept separately from the recording and notes of our conversation.

Your participation in this research is voluntary. If at any time you want to withdraw from this study, please tell me and we will stop the interview. I will erase the recording of our conversation. If you wish to withdraw from the study in the future, please contact me. All documents that you provide me with, as well as the transcripts that I develop from these interviews, will use an identifier in place of your name to protect your confidentiality.

The recording of our conversation will be stored securely on One Drive. The recording of our conversation will be erased once it is transcribed into notes. Only I will have access to the recording and the notes taken during the interview.

If you have questions about this research, please contact me at 571-220-5504. You can also contact my faculty advisor Catherine Brighton at 434-924-1022. If you have questions about research participants' rights, please contact Tonya Moon, IRB Chair, at 434-924-0823.

Now I would like to ask you if you agree to participate in this study, and to talk to me about the HMH Into Reading adoption. Do you agree to participate?

Do you have any questions or concerns before we begin?

Background:

Please state for me your current position.

How long have you been in this role?

Initial Adoption

Prior to the *HMH Into Reading* adoption, what was your primary method/resource for literacy instruction? *(Prior Conditions, RQ1,c)*

Describe for me your level of training and experience teaching literacy outside of any training associated with HMH? *(Prior Conditions)*

You were identified by a member of leadership as being a successful HMH implementer. Would you agree with this statement? Why? *(Decision/Persuasion, RQ1c)*

Initial Adoption

What year did you first begin using the *HMH Into Reading* program in your classroom?

Why did you adopt this program? *(Decision/Persuasion/Implementation, RQ1a,b,c)*

How would you describe your initial attitude towards this program? *(Knowledge/Persuasion, RQ1c)*

How different were the components of this program to the way you previously taught literacy or the previous resource you used? *(Persuasion, RQ1,b,c)*

What conditions do you think helped you become successful in this program's use? *(Decision/Persuasion/Implementation, RQ1,a,b,c)*

Thinking back to the initial adoption of this program, describe for me the training process you underwent during the first year of adoption. *(Implementation, RQ1,a)*

Are there any conditions at school or the school division which served as an impediment when you initially started using this program? *(Persuasion/Decision, RQ1a,c)*

I am going to list a few common roles within a school system. Please describe their involvement in the HMH Program adoption process: colleagues, teacher leaders, school administrators, school division leadership. Were there any people that were particularly influential in your eventual adoption of this resource? *(Persuasion/Decision)*

Current Use

What percentage of your literacy instruction involves you using this program?

What ongoing training, support, or other types of accountability do you experience as a literacy teacher in this school division, particularly involving this program? *(Implementation, RQ1,b)*

Would you consider division resources, assessments, and expectations to be aligned with the HMH program? *(Decision/Implementation/Confirmation, RQ1a,b,c)*

Attitudes Towards Resource

What are your current feelings about the HMH resource and its required use in your division? *(Confirmation, RQ1c)*

Have these feelings changed since you initially adopted it?
(Decision/Implementation/Confirmation, RQ1c)

General Change Attitudes

Would you consider yourself to be an innovative teacher? *(Implementation)*

When trying something new, what support structures do you seek out? *(Prior Conditions)*

Would you consider yourself to be an independent or collaborative learner? *(Prior Conditions)*

Are there other program adoptions like the HMH program adoption you have experienced in your career? *(Prior Conditions/Knowledge)*

Appendix C

Codebook

Code Name	Definition	Inclusionary Criteria	Exclusionary Criteria
Teacher-Centered			
TB-Lit	Teacher Belief (TB) General Literacy Instruction	Statements regarding beliefs around how to teacher components of literacy	Non-literacy statements, statements regarding student abilities.
TB-SEL	Teacher Belief (TB) Self-Efficacy (Literacy Change)	Statements regarding teachers' own belief in their ability to change their literacy instruction	Statements about the program, working conditions, etc., not directly related to their own beliefs in themselves.
TA-HMH	Teacher Attitude (TA) towards HMH Resource	Statements regarding attitude about HMH program, its components, related trainings, research behind the resource	Statements about working conditions, etc., that are not components of the program or resources.
TA-Scope	Teacher Attitude (TA) towards Scope of Change w HMH Adoption	Statements regarding expectations and breadth of change required for HMH adoption	Statements about resource, self-efficacy, working conditions, or own beliefs in literacy.
Working Conditions and Resources			
Time	Time	Statements regarding time afforded for training, planning, grading, or other related teacher professional actions including collaboration, team planning, related to the HMH program OR competing initiatives.	Personal and non-generalizable statements or working conditions
Collab	Collaboration	Statements regarding team planning, PLCs, whether in-person, virtual, etc., when solely related to HMH	Teamwork unrelated to HMH, viewpoints on utility of teamwork.

		adoption or implementation.	
Coaching	Coaching	Statements regarding coaching support as defined in Ch 2.	Other forms of collaboration.
RA	Resource Alignment	Statements regarding resources provided within HMH and expectations local or from the state requirements.	Alignment between preferred resources instead of required ones.
Materials	Material Availability	Statements regarding the availability of required resources within HMH program guides or required by RPS.	Supplemental materials not required by RPS or HMH.
PD	Professional Development	Statements regarding required formally planned teacher learning delivered by RPS staff or hired contractor to support HMH.	Formal teacher training unrelated to HMH/Literacy.
LS	Lesson Study	Statements regarding the formal use of lesson study as defined in Ch 2.	Casual sharing of lessons between teachers.
Chg. Led	Change Leader	Statements regarding official or unofficial (teacher defined) staff who encourage or oversee the implementation of HMH (or related resources).	Change leaders not related to studied program implementation (HMH)
Innovation Outcomes			
Stud Ach	Student Achievement	Data demonstrating student performance in literacy	Non-measurable student performance statements.

Teacher Self Eff	Self-Efficacy	Statements regarding teachers' belief in their own professional ability as related to HMH	Attitudes/beliefs about resource or working conditions.
Gen Work Cond	Working Conditions	Statements regarding supportive/unsupportive structures in which teachers implement HMH.	
Rogers' Diffusion Process Phases			
R-KC	Rogers' Knowledge of Change	Statements regarding teachers' perceptions of proposed change prior to its adoption	Post adoption beliefs
R-Persuasion	Rogers' Persuasion Stage	Statements regarding the process in which teachers began to understand the components, benefits, drawbacks of HMH	Post-adoption beliefs, implementation barriers
R-Decision	Rogers' Decision Stage	Statements regarding teachers' thought process about trying or rejecting the initial HMH adoption	Post-adoption beliefs, implementation barriers
R-Continue	Rogers' Implementation Continue Path	Statements regarding continued use of HMH, or eventual use of HMH	Initial decision point statements.
R-Reject	Rogers' Implementation Reject Path	Statements regarding rejection, or delayed rejection of HMH.	Initial decision point statements.
R-Conf	Rogers' Confirmation Decision	Statements regarding post decision adoption or rejection of HMH.	Initial decision point statements.

Appendix D

Document Analysis Intake Form

Document Name	
Document Identifier	
Date Received/Source	
Creation Date	
Document Description	
Research Question Relationship	
Triangulation to Other Data/Contradictions or Supportive Findings	
Rationale for Inclusion	
Questions for Consideration	

Adapted from The Center for Open Science (2020)

Appendix E

Initial Participant Perceptions of Breadth of Program

Participant Group	Descriptive Terms (direct quotations)
Change Leaders	• …that it's very comprehensive as well and time consuming. • Um, because everyone was like looking at it, trying to figure out how do you fit everything in. • How do you do all of the parts all at once without a master schedule adjustment? • I mean, there's, you know, there's more stuff than you could ever see. • Like, if anything, it was just trying to like, not be overwhelmed by the resource. • I think the biggest challenge that I saw with teachers was, was the time piece. And like, how much time? Like there's so much in it. • And the resource tries to meet everything right. Like, it tries to be it includes all these other pieces.
Successful Teacher HMH Implementers	• More in them than humanly possible to apply. • You obviously like, can't get through all of them. • You're maybe not doing all of them because again, we're choosing quality over quantity. • It's a lot of resources. • Has tons of stuff, like, more than you could ever possibly get done in a literacy block. • HMH is so big… • Like, this is so much. • There's a ton of read alouds, but you can't get through all of them in a week. • There's just so many pieces…

- I do think because there's so much of something, it was helpful for me to take like one piece of it to really learn.
- …because it was so much.
- I definitely remember thinking it was overwhelming and there was a lot of pieces to fit in in our short amount of time.
- So, I do remember feeling overwhelmed.

Appendix F

Professional Learning Community (PLC) as a Supportive Condition

Data Source	Data Source/Participant Quotation
Teacher Participants	• …our literacy coordinator was just at our third-grade plc. And so, I think she's hearing what's going on and asking people to like be a part of the team. • I've never [before] experienced this level of PLC work consistently. • …we always pick, um, a PLC that we're going to talk through that data. And that all goes on the same, um, shared data spreadsheet • One week. It's a PLC where like it's a little bit more formal and everybody's at the table. And then the other week it's like a planning.
Change Leaders	• …be listening in on a PLC and walk into a classroom and have some idea of what they're looking for. • Maybe the reading specialist doesn't go to the third and fourth grade PLC. Just the coach takes that kind of thing. So, it's really about like, who are the people in the places you have the right people in the right places. • In the building I was in, we had a weekly math and a weekly literacy plc. So, I mean, we were working through the modules, even in the years where we came back, where I had transitioned away from the principalship and moved into a coach... So, um, we were going through the I mean, like, our PLCs were spent like walking through the modules, like we would settle on, um,

	you know, I'm sure you're familiar, but, you know, you do the initial read and then there's like close reads, but there's like different focuses for the close read. And we would sort of settle on which one are we going to do if there was a ton of vocabulary words, we're selecting the vocabulary words. • And so, I know like in my role, um, when I was a coach, when, when those conversations were coming up, like I was working with teams and plc, like, here's your data. Okay, let's map out what your block will look like.
Supportive Documents	• K-5 ELA Implementation Orientation • PLC Agendas (supplied by all three teacher participants) • K-5 HMH ELA Implementation Guide • Science of Reading Canvas Course • VA Literacy Act Implementation Guide • RPS Division Literacy Plan • RPS Pacing Guides • LETRS Overview

Appendix G

Teacher Participants' View of Supportive Instructional Coaching

Participant	Descriptive Terms (direct quotations)
Nicole Franklin	• So, the coach that we had at the time was full-time only at Moncure. So, she was there. Um, she never left. She was there. She was a part of every PLC. So not only did she support our PLC work, but she knew exactly where we were with pacing. She knew what was happening so she would anytime she wanted or anytime we asked her would pop in. Um, and she would either like, jump right in and co-teach because I felt comfortable with that. Um, or she would sit in and she would be able to give us feedback. So, there was constant support and constant feedback. • …our instructional coach was who we really relied on. Like they were. She was the one who was digging in with us, um, and helping us plan and modeling and coaching and giving us feedback. • I think I really believe it's because of the coach. And now this is I'm on my second coach. I really it's, it's the in-house coaching model because they are just in one place. They know us so well. They're in and out of our classrooms. There is a different level of trust that when I come in, I say this, I know this could be better, but I want some help digging through it.
Sarah Rodrigo	• …she [instructional coach] was a good source with um, even just like

	pointing out the different material, you know, because you're told at the beginning of the year you have all this stuff, and then you kind of forget. And so, she was a good source of being like, remember, you have these and this is where they are. Um, so yeah, she was great.
Stephanie Thompson	• …but the coach is just, like, inputting and really helpful. Like, they get to see K through, you know, we're four here. So, they're able to see some of those trends that when you're like working in your little silo, you're not able to see. Um, so it's helpful to have somebody there that's sort of seeing this on like a broader lens. • I love when like the coach comes in and observes and gives, um, feedback.