Balanced reading instruction: Birth of a new movement

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Balanced reading instruction: Birth of a new movement

Abstract
The question of how best to teach children to read and write has been debated for years. Cunningham (1991) suggests that reading instruction began in the United States with an alphabetic approach. Children learned the letters, and then spelled and sounded out the letters of words. This approach was known later as the phonics approach. Some educators still insist that it is the only sensible approach to begin reading instruction (Adams, 1991; Stahl, 1992; Stahl & Miller, 1989; Teale, 1991). The most commonly used reading material in reading instruction has been the basal reader (Chall, 1983; May, 1994). Basals teach both phonics and comprehension and have gradually increasing levels of difficulty with emphasis on teacher-guided reading. Some current reading experts have encouraged a literature or tradebook approach to reading (Sloup, 1987; Veatch, 1959; Yatvin, 1992). The emphasis in this approach is on children selecting real books they want to read and teachers providing individual readers help as needed.
BALANCED READING INSTRUCTION

BIRTH OF A NEW MOVEMENT

A Graduate Review
Submitted to the
Division of Reading and Language Arts
Department of Curriculum and Instruction
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of the Requirements for the Degree
Master of Arts in Education

UNIVERSITY OF NORTHERN IOWA

by
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CHAPTER 1
INTRODUCTION

The question of how best to teach children to read and write has been debated for years. Cunningham (1991) suggests that reading instruction began in the United States with an alphabetic approach. Children learned the letters, and then spelled and sounded out the letters of words. This approach was known later as the phonics approach. Some educators still insist that it is the only sensible approach to begin reading instruction (Adams, 1991; Stahl, 1992; Stahl & Miller, 1989; Teale, 1991).

The most commonly used reading material in reading instruction has been the basal reader (Chall, 1983; May, 1994). Basals teach both phonics and comprehension and have gradually increasing levels of difficulty with emphasis on teacher-guided reading.

Some current reading experts have encouraged a literature or tradebook approach to reading (Sloup, 1987; Veatch, 1959; Yatvin, 1992). The emphasis in this approach is on children selecting real books they want to read and teachers providing individual readers help as needed.
A fourth approach to reading can be labeled language experience/writing which is popular in England and Australia. It is based on the idea that the easiest material for children to read is their own and their classmates writing (Cambourne, 1988; Routman, 1991).

Each approach has been in and out of popularity over the years. The question of which approach is best is the wrong question. Each approach has undeniable strengths, such as phonics instruction, which enables beginning readers to decode how our alphabetic language works.

Stahl and Miller (1989) indicated a clear need for phonics instruction for at risk children who have not had much exposure to reading and writing in the home. Adams (1991) reviewed research related to beginning reading. She concluded that all children - especially at risk children - need much variety in reading and writing experiences, plus direct instruction in letter-sound patterns.

Bond & Dykstra (1967) conducted a major study in the 1960's, for which the federal government spent hundreds of thousands of dollars, to find out the best approaches to beginning reading in first and second grades around the country. In general, the study concluded that a combination of approaches worked better than any other single approach. There were greater
differences within any approach than between approaches, showing the critical importance of the teacher.

Pearson (1989) has witnessed many movements as a professional educator but none like the rapid fire whole language movement. Polarization of opinions, whole language on the left and a skills driven model on the right, have left those who supported a middle opinion feeling uncomfortable.

Bergeron (1990) searched 64 articles on whole language and found 64 different definitions. She concluded that no exact definition exists, and that it means many things to different people, i.e. an approach, a philosophy, a theory, a curriculum.

Bergeron then proposed definition #65, "Whole language is a concept that embodies both a philosophy of language development as well as the instructional approaches embedded within, and supportive of, that philosophy. This concept includes the use of real literature and writing in the context of meaningful, functional, and cooperative experiences in order to develop in students motivation and interest in the process of learning" (p. 319).

Thompson (1993) states "Balanced Reading Instruction is a philosophy of balancing methodologies, assessments, materials, and strategies. Nothing is bad nor ruled out. Most reading materials and teaching techniques can be employed successfully if
the teacher employs common sense and provides a balanced reading program" (p.9).

Thompson (1994) believes "...the balanced reading philosophy liberates teachers for instructional decision making. By implementing balanced reading as their guiding principle, teachers are free to choose any method or material to teach reading. Balanced reading promotes a harmonious relationship among methods and procedures permitting teachers to have wide latitude in their instructional decision making to meet the needs of individual learners" (p. 46).

The goal of this paper is to examine and synthesize current trends and issues in reading and language arts. The four major purposes are as follows:

- The first purpose is to review the philosophy and key elements of whole language theory in practice.
- The second purpose is to describe the beginning of Balanced Reading Instruction (BRI) in Great Britain and the United States.
- The third purpose is to explore the general expansion of Balanced Reading Instruction.
- The fourth purpose is to analyze future implications of the BRI movement as it relates to reading and language arts instruction.
CHAPTER II
THE PHILOSOPHY AND KEY ELEMENTS
OF WHOLE LANGUAGE

This review examines four aspects of the philosophy and key elements of whole language theory in practice. First, the nature of whole language is discussed. The second aspect focuses on the differences between whole language and traditional language programs. The third aspect concerns the key elements of a whole language classroom. Finally, the future implications of whole language are discussed.

Nature of Whole Language

Whole language is a current perspective about the teaching and learning of literacy through language. It is a belief or philosophy about language learning that is personally held. It is a paradox that students learn from whole to parts, and not in the fragmented skills, parts to whole concept of the traditional classrooms. Smith (1992) states whole language displays a
number of names, though usually called "whole language (in North America and Australia), real books (in Britain), and, occasionally, literature-based learning, language experience, or emergent literacy" (p. 440).

In whole language classrooms, reading and writing are learned through immersion in reading and writing activities. These classroom activities should integrate reading, writing, speaking, and listening across the curriculum. The curriculum is learner-focused, the child has active ownership in decisions and choice of materials, and the classroom is a community where teachers learn and learners teach (Edelsky, Altwerger, & Flores, 1991).

Whole language is based on the premise that language is easily learned in a natural, stimulating, fun-filled setting (Goodman, 1986). Goodman states that language is "real and natural, whole, sensible, interesting, relevant, belongs to the learner, part of a real event, has social utility, purpose, choice, accessible, and has power for the learner" (p. 8).

Whole language programs respect the learners - their backgrounds, and how they currently talk, read, and write. In this ownership is a power to purposefully use knowledge in development of thought and language (Goodman, 1986).
Whole language theory-in-practice views language as natural, social, aesthetic, and predictable. Language is naturally and socially shared to create meaning, whether oral, written, or signed for the deaf. The aesthetic qualities of musicality, design and balance, and symbolism give pleasure to language users (Edelsky, Altwerger, & Flores, 1991).

Smith (1988) addresses the inherent predictable nature of language, as all the subsystems work together. Edelsky, Altwerger, & Flores (1991) state a child generates and tests hypotheses from this "supersystem of interdependent, inseparable, subsystems" for the total system building of whole language (p.11).

The process of generating hypotheses is a meaningful transaction in a sociohistorical setting. The reader/writer does not merely retrieve meaning from the text as he/she decodes words, but creates meaning from purpose, expectation, and ownership in reading and writing using all the language cueing systems. There are no correct meanings, but just plausible meanings in each learner's unique interpretation (Edelsky et al., 1991).

The subsystems of language are phonological, syntactic, semantic, and pragmatic. In a given language, the phonological system of oral language states what sounds are possible under
specific conditions. The graphic and graphophonemic systems are the counter parts for written language, as is the gesture in sign language. The syntactic or "grammatical" system is the set of rules that sets the structure or shape of sentences. The semantic system reveals the meaning of words and sentences, and the pragmatic system relates the connections between the context and all aspects of language (Edelsky et al., 1991).

Comparisons of Whole Language and Traditional Classrooms

Whole language is a revelation that results in using alternatives to the traditional classroom methods. Under a whole language philosophy, teachers eliminate ability grouping and tracking in reading and writing. A whole language philosophy devalues language-based stratifying of children into groups (Edelsky et al., 1991).

Whole language is not another name for a whole word or sight word approach. With a belief in whole language, teachers do not separate skills in context, but in authentic reading and writing immersion of purposeful materials. Whole language is not a method, package, or program (Edelsky et al., 1991).
Whole language rejects such teaching practices as isolated phonics skill sequences, and slicing up reading/writing into basal reader grade sequences. Instructional practices to simplify texts by controlling sentence structure and vocabulary are incompatible with whole language philosophy. Scores on tests of sub-skills do not equate with actual reading and writing. Reading and writing instruction is not isolated from its use in learning. Whole language philosophy does not believe "there are substantial numbers of learners who have difficulty learning to read or write for any physical or intellectual reason" (Goodman, 1986, p. 34).

The traditional cognitive and behavioristic theories of learning outline formal steps in the thinking processes. The base of the whole language movement is the cultural-historical theory in which the thinker and thinking subject reflect continuous literary behaviors. The sense of being literate enables teachers and students to "stop thinking about learning and to think learning instead" (Heath, 1991, p.22).

Sumara and Walker (1991) address criticism that the "romantic" open classroom or "laissez-faire" climate is a dangerous fore-runner of whole language. This criticism is dispelled as whole language concepts about empowerment, control, predictability, and authenticity become concrete methods that shape engaged teaching. Once these expectations and
conditions are in place, the teacher can also demonstrate the role of a learner. The teacher is a primary "text" in the classroom, and becomes, "the lens through which the curriculum is focused" (p. 283).

Ridley (1990), a former whole language consultant in the Denver, Colorado, elementary schools, speaks to criticisms of whole language such as accountability, lack of resources, misconceptions, resistance to change, and inadequate professional staff. Ridley addresses each criticism by citing elements of whole language practice. Whole language accountability may include meaningful portfolios, conferences, observations, and self assessment to replace standardized tests. A network of school computerized resources collects and distributes literature to reinforce any lack of resources. Key teachers enthusiastic about whole language serve as resource people and models to support each other professionally. More time and exposure to whole language with added professional support allow the whole language grassroots movement to flourish into philosophy and practice.

Newman and Church (1990, 1991) address whole language myths about skills, instruction, evaluation, learners, whole language teachers, and grand myths. The myth that, in whole language classrooms, there is no teaching of phonics, spelling, or
grammar skills is dispelled as the author describe the ways learners are guided in to using language cues (graphophonemic, semantic, syntactic) plus pictorial cues to read and write.

The instructional myths of no structure or no teaching are dispelled by descriptions of structured classrooms where teachers are active participants and learners engage in purposeful experiences. The myths of literature-based and the teaching only of language arts are quieted as literature is used as a vehicle to solve meaningful problems in all curricular areas.

The myths of no evaluation, as well as no standards, and dealing with process and overlooking the product, are dispelled as teachers give on-going evaluations. The intrinsic standards are based on theoretical knowledge that such standards impose increased expectations on students. Both the process and the product of learning are valued in the whole language philosophy of theory in practice.

The myths about learners state that whole language applies only to early grades and that it does not work for special needs children. Principles of whole language are appropriate regardless of age, with most benefit to special needs children, for they are encouraged to take risks, experiment, and build on their strengths.

The myths that whole language teachers need only a few tips, a few in-service days, and no support from administration,
are dispelled by the fact that administrative support is essential for teachers who are experiencing change and exploring new methods under the whole language umbrella. Like students, teachers need time to risk, experiment, and explore theory and implications for classroom practice.

The grand myths say that there is only one right way to "do" whole language, and that whole language is only for super-teachers. However, in a whole language classroom, every instructional decision is based on the needs demonstrated by the children on a daily and a moment-by-moment basis. Children's knowledge of language and their experiences are combined with their literary purposes and interests to plan instruction. Every teacher, with professional support, can explore to create the subtle structures that shape the whole language learning framework.

Smith (1992) addresses two views of learning as follows: the official view, almost universally the standard view in education, and the informal view, or whole language approach. The official view looks at learning as MEMORIZATION, that requires effort, work, and reflects solitary instruction and practice. The informal view regards learning as GROWTH, spontaneous, effortless, developmental, involving social interaction. "Learning is a vicarious consequence of
demonstration and collaboration between students and teachers. We learn from the company we keep" (p.432).

The formal view of learning supports phonics or whole-word alternative methods to teach reading. Smith argues that the rules of phonics are too complex (more than 300 correspondences between letter and sounds) and too unreliable to be useful to children as a primary method for word identification. In using the whole word method (learning to recognize words instantly without using phonics or context), children must first become readers, so they can learn new written words through supportive authors. Smith claims, "children who cannot learn and remember a dozen pre-selected words or a list after an hour of study can effortlessly learn and remember 20 words a day in interesting and meaningful contexts" (p.440). The whole language philosophy is now the alternative to phonics proponents, and takes the place of the mostly abandoned whole-word approach.

The basis for whole language is two-fold. First, there is respect for language which is natural and real, versus fragmented or contrived language. Second, there is respect for learners engaged in meaningful activities versus drills and rote memorization (Smith, 1992).

Reutzel and Hollingsworth (1988) estimate silent reading time in a typical classroom is seven or eight minutes per day, or
less than 10 percent of the total reading periods. 70 percent of reading instructional time is spent on independent worksheets.

In the whole language approach, exposure and immersion in a print-rich environment based on intrinsic motivation provides much time for actual reading and writing. Teachers participate with their students with praise for "approximations" and not "corrections only" in reading and writing behaviors. Whole language teachers use techniques like brainstorming and predicting to build story background, rather than telling students about the story or providing outlines. Teachers are "living demonstrations of learning and how to learn...more concerned with how children learn rather than with how teachers should teach" (p. 412).

**Key Elements of the Whole Language Classroom**

Weaver (1988) paints a picture of the whole language classroom. The art composition focuses on "the complex arrangement and organization of people (students and teachers), materials, and activities, as well as the complete spectrum of language and life found in the classroom" (p. 233). Art as a metaphor is chosen for two reasons. First, the balance of colors,
textures, perspective, and aesthetics needed in a quality painting reflect classroom learning and teaching experiences. Second, whole language teaching and learning communities are quality "works of art" (p. 233). Just as there is no painting by number, all the canvas shading, depth, and color influence everything else in the picture. This analogy depicts the acts of creation in the use of whole language through reading, writing, listening, speaking, and signing for the deaf.

Whole language addresses the unique qualities of the individuals - students and teachers - in real reading and writing activities related to their world. It is a student centered curriculum where children are curricular informants to reflect their interests, abilities, and needs into purposeful curricular plans and instructional practices.

Baskvill (1991) states the role of the teacher in a whole language classroom is "important, complex, and constantly changing" (p. 60). "Mediation" by the teacher takes the form of meaningful literary experiences, such as modeling, mini-lessons, and peer interactions (Staab, 1990).

Cambourne's (1988) principles of learning apply to a whole language philosophy that children can learn to read and write naturally in a meaningful context and environment, just as they learn to talk. Cambourne's principles of learning include
demonstration, immersion, responsibility, expectations, feedback, approximation, and employment.

By **demonstration**, the teacher serves as a model of the reader/writer/learner by creating a warm, positive environment in the classroom. In **immersion**, literacy abounds in the classroom as the teacher creates rich, informational print and literature. The students engage in real books, rather than worksheets.

By **expectations**, the teacher communicates that all children can learn to read and write. Through **responsibility**, the child has ownership of learning. The student chooses interesting reading and writing areas for real purposes. Through **feedback**, the teacher shows specific positive response and a sincere interest in writing and reading activities. The teacher creates learning situations which exploit the natural intelligence and curiosity of students.

In **approximation**, a franchise to "have a go" encourages students to take risks. "There is always more than one meaning in good literature" (J. L. Steele, Recent research in reading lecture, University of Northern Iowa, July, 1992). Readers and writers use all the systems of language (linguistic and pragmatic) to create meaning (Weaver, 1988). In **employment**, much priority time is spent reading and writing. The teacher offers a variety of experiences to enrich students' language in every curricular area.
Cambourne (1988) states a balanced whole language program should have the following key elements: Reading to children, Shared book experiences, USSR (Uninterrupted Sustained Silent Reading), Guided reading, Individualized reading, The (new) language experience, Children's writing, Modeled writing, Sharing time opportunities, and Reading and writing across the curriculum. Cambourne's principles of learning - demonstration, immersion, responsibility, expectations, feedback, approximation, and employment - are present in the key elements. The emphasis may vary among elements because of age or grouping.

**Reading to children.** Routman (1991) states "Reading aloud is seen as the single most influential factor in young children's success in learning to read. Reading aloud improves listening skills, builds vocabulary, aids reading comprehension, and has a positive impact on students' attitudes toward reading" (p. 33). Weaver (1988) addresses that the importance and respect of good literature in the curriculum is modeled as teachers read and tell stories to students daily. Literature is at the heart of the reading program, and this preserves a rich literary heritage.

**Shared book experiences.** Routman (1991) defines "shared reading as any rewarding reading situation in which a learner --or group of learners--sees the text, observes an expert (usually the
teacher) reading it with fluency and expression, and is invited to read along" (p.33). All efforts of the learner are encouraged, and students have opportunities to reread the literature independently. Other approaches may include student reading, paired reading, or tape recorder use. Writing, talking, and drawing as a later response is the beginning of comprehension. Staab (1990) uses "FYI'S" (For Your Information) as strategies or skill discussion to briefly give relevant information in learning situations like shared reading. "What children can do with help one day, they can do by themselves another day" (p. 551).

Sustained silent reading. The teacher provides regular extended periods of time for students to read silently. Routman (1991) addresses the following: "Time spent reading...the best predictor of a child's growth as a reader from the second to the fifth grade" (p.43). Other names for silent reading include: RR (recreational reading), DIRT (daily independent reading time), and DEAR (drop everything and read). WEB (wonderfully exciting books) is an enthusiastic reading program Routman suggests for voluntary reading outside of school. In silent reading, it is important the teacher models, provides books, and observes. The teacher gives students experiences and opportunities to use independent reading skills as they take risks and apply ownership.
Guided reading. Guided reading is at the heart of the reading instructional program as the children are guided through the text by the teacher (Routman, 1991). The teacher models questions and works with a small group of children to develop thinking strategies. All the children read independently and meet with the teacher in conference to discuss skill and learning comprehension strategies. It is important the teacher labels and shares the need for the strategy, models it, and gives much time for practice.

In most whole language classrooms, the teacher conducts reading conferences in a Reader's Workshop format, with time, ownership, and response as the key elements. No interruptions are permitted, and length of time may be expanded as fluency increases (J. L. Steele, Recent research in reading lecture, University of Northern Iowa, July, 1992). A response to the book such as writing or drawing may occur before, during, or after the conference.

ERRQ (Estimate, Read, Respond, Question) is suggested as a strategy for meaning. Other strategies for meaning include visual imagery, re-reading, self-questioning, and "think alouds". Strategies in pre-reading such as prediction, question-asking, and word connections help to activate prior knowledge which can be verified and answered in reading. Semantic Mapping and K-W-L,
or "What I Know, What I Want to Know, and What I Have Learned", are examples of pre-reading strategies. A post-reading strategy should provide closure to reading by combining knowledge of the material into new informational schemas.

**Individualized Reading.** Routman (1991) states that "students self-select fiction and non-fiction books, self-pace their reading and performance, and conference with the teacher" (p. 41). Though this individualized program is great to place emphasis on interests and self-selection, "small-group guided reading...discussing the same book...is necessary to reach the high level of critical thinking and interaction that can evolve only from in-depth discussion of a book that a group of students are reading" (p.41). The reading conference keeps the student accountable.

**The (New) Language Experience.** Student experiences are used to teach reading and writing. Meaningful approximations of children's writing are respected. Weaver (1988) says it is important to call attention to students' writing even before calling attention to reading. "Along with hearing stories, writing is one of the most powerful influences to becoming a proficient reader. Listening, responding, writing, and reading make students better and avid listeners, speakers, writers, readers...and thinkers" (p. 243).
Children's Writing. Children respond to books and real experiences by writing. Students begin to use strategies taught in guided reading or modeled writing, with teacher reinforcement and encouragement. Most whole language teachers use a Writer's Workshop as a conference plan with a portfolio of student writing for evaluation and assessment. Baskvill (1991) starts class with the first 30 minutes of self-selected activities, followed by Personal Writing Time in which the teacher is a "writer among writers" (p. 61). Goodman (1987) states that "pupils learn about basic forms of writing by using them. As long as they keep on writing meaningfully, young writers will move toward conventional spelling and punctuation, and control over the forms of stories, letters, and other writing genres" (p. 51).

Modeled Writing. A group of students observe an experienced writer who models strategies as reliable techniques. Routman (1991) refers to Writing Aloud, as a "powerful modeling technique at any grade level". "The teacher makes explicit what he is doing...the thinking, the format, layout, spacing, handwriting, spelling, punctuation, discussion of vocabulary" (p. 51). Students' interest, motivation, as well as quality of writing are enhanced.

Opportunities for Sharing. The young writer often uses an author's chair to present a finished piece of writing to the
audience. In this forum both reader and listener are developing response strategies. Shared writing has benefits, such as: reinforces and supports the reading process, provides reading texts relevant and interesting, makes it possible for all students to participate, and promotes confidence, development, and enjoyment of reading and writing (Routman, 1991).

Reading and Writing Across the Curriculum. Students use writing and content area reading to extend learning to other curriculums. Students use language strategies in their search for meaning in content areas. The best way to think about other content areas is to read and write about them. Newman and Church (1990) state "Whole language philosophy underlies the entire curriculum. Inquiries in science, social studies, and mathematics provide many opportunities for learners to be actively involved in solving meaningful problems" (p. 21).

Future Implications of Whole Language

A love for books and an eagerness to engage in ideas, critiques, and analysis are central to a whole language philosophy. Whole language is not a generic name for Progressive Education.
It does not carve people into emotional, cognitive, and social parts and view teaching as garden maintenance. Rather than behavioristic psychology, whole language has its base in a "transitional, sociolinguistic model of language use and a social, interactionist view of language acquisition" (Edelsky et al, 1991, p. 108).

Pinnell and Estes (1990) state that most powerful teaching tools appeal to a child's strengths, instead of his/her weaknesses. Young readers must have massive amounts of real, meaningful, and enjoyable reading and writing. Teaching is learning -- "a decision making process that interacts systematic observation, in-depth analysis, hypothesis testing, and self evaluation" (p.294).

Sulzby and Teale (1989) address the child's role as constructor of his/her own literacy. Research shows a need for a better "fit between instruction and development", or putting "research into application" (p.750-751). J. L. Steele (Recent research in reading lecture, University of Northern Iowa, July, 1992) addresses a great need for action research in the classroom; teachers should continually activate qualitative research with students. Assessment should come as naturally as the learning process. Portfolios are a powerful self assessment to the child. In the past, assessment empowered the instruction. Time on task,
ownership, and response of the student are essential key elements in the whole language philosophy of teaching and learning.

Heath (1991) states industry and technology show a need for "collaborative problem identification and solutions, dependent upon rapid information exchange, creativity, and risk taking" (p. 20). The whole language classroom with its social dimensions of communication, idea building, and problem solving, are an asset to technology. The teacher's challenge in research and education is to model and collaborate with other teachers. The teacher's challenge is two-fold: "First, to learn more about alternative, expanded genres of language across cultures and situations, and second, to observe and analyze classrooms using intuitive knowledge to continually reassess the best conditions for learning" (p.21).

Goodman (1986) states that a whole language classroom must have a whole language teacher. The teacher is committed to "using the best available knowledge to educate every learner to the fullest extent possible" (p.69). J. L. Steele (Recent research in reading lecture, University of Northern Iowa, July, 1992) addresses whole language as having three dimensions: language, literacy, and democracy. Reading and writing are not subjects, but tools for students to communicate their own ideas and become life-long reader/writers to enhance and change their world.
By the late 1980's some educators in Great Britain and the United States had begun to question the whole language philosophy, and to feel uncomfortable with some of its key elements. Due to these concerns, several educators formulated the Balanced Reading Instruction (BRI) movement based on the theory that reading is a skill which is best taught through balanced instruction and practice.
The concept of Balanced Reading Instruction (BRI) was introduced by Dr. Richard Thompson of the University of Central Florida in February of 1990, when he was invited to speak in Tampa at a Federal Assistance Conference. Dr. Thompson's topic was "Fallacies in Whole Language Zealotry," where he was the only speaker not aboard the "whole language bandwagon". Thompson decided to speak out against Whole Language when he realized interest was not fading in a "whole sentence meaning methodology". Further, he was "amazed at the weak justification of this philosophy," and concerned for the future of BRI (R. A. Thompson, personal communication, August 5, 1992).

In October of 1990, Dr. Thompson delivered a paper entitled "Balanced Reading Instruction Versus Whole Language" at the Florida Reading Conference. In December Dr. Thompson and Dr. Bob Jerrolds of North Georgia College spoke at the American Reading Forum on "The History of the Whole Language Concept".
Then Dr. Thompson attended the European Reading Conference and the United Kingdom Reading Association co-sponsored meeting in Edinburgh in the summer of 1991. A group of British educators circulated a flyer entitled "A Manifesto for Balance in the Teaching of Literacy and Language Skills" that supported five propositions for teaching of literacy:

- Balance between teaching and facilitation of children's learning
- Balance between different approaches
- Balance between use and awareness of language
- Balance between incidental intervention and planned lessons
- Balance between "real books" and published teaching materials

Thompson (1992) published "A Critical Perspective on Whole Language", where he stated "In teaching reading, direct instruction is not only the most effective way of developing students' phonics and other reading skills, but it is the most efficient instructional strategy for teaching" (p.139).

Since the Edinburgh meeting, Dr. Thompson pondered how to counteract the "whole language phenomenon" of teachers "running reading and writing activity programs with no skill
substance." Few of Dr. Thompson's professor contacts were "imbibing the WL philosophy". Meanwhile most administrators were "embracing the WL flag without looking at the past nor searching the literature" (R. A. Thompson, personal communication, August 5, 1992).

To remedy this problem, Dr. Thompson thought the best plan was to have educators share their concerns for the teaching of reading; a special interest group under the IRA would be the best idea. Dr. Thompson used Balanced Reading Instruction in his presentations, and the Brits were organizing under the same name since the "Balanced Manifesto" was circulated.

Labeling the proposed Small Interest Group (SIG) as "BRI", Dr. Thompson wrote to IRA president, Judith Thelan, for input at the 1992 IRA Orlando and the 1993 San Antonio meetings. The letter was passed to Marie Clay, the incoming president. Since no space was available, Marie Clay stated the IRA Board would meet in July to consider the SIG applications and would act in October. Dr. Thompson collected several names as supporters of the BRI SIG at Orlando and mailed these to the IRA. Dr. Thompson and Dr. Roger Rouch of St. Cloud State University were co-sponsors to launch the SIG. They asked Dr. Dale Johnson of the University of Northern Iowa for suggestions in the program and organization (R. A. Thompson, personal communication, August 5, 1992).
Thompson and Rouch mailed letters to Dr. Johnson and other charter members of the BRI SIG in regard to the application submitted to the IRA board meeting in October. The co-sponsors needed ideas and names for the program at the April 16-30, 1993, IRA Convention in San Antonio. An organizational business meeting was also planned to elect a chair and secretary at a minimum or more. There was also a need for at least four committees- Constitution, Program, Nominations, and Publications (R. A. Thompson, personal communication, August 18, 1992).

R. A. Thompson (personal communication, September 5, 1992) thanked Dr. Johnson for his willingness to serve and help develop the BRI program. Dr. Johnson was to review the program proposals and to forward his recommendations.

In a letter to Dr. Thompson, Brenda Townsend, Director, Division of IRA Professional Development, stated no new SIG's were approved in October, but the BRI SIG may be approved at another IRA board meeting planned prior to the San Antonio convention. Brenda Townsend enclosed a schedule for SIG's in San Antonio with the BRI SIG included on the agenda (B. S. Townsend, personal communication, September, 16, 1992).

R. A. Thompson (personal communication, September 28, 1992) enclosed the BRI program proposals and requested Dr. Johnson to "patch together" the best ideas. Susan Blair-Larson
would head up the Constitution Committee and "get quick action". The tentative program schedule would include: Welcome, Kick-off Speaker, Program Presentations, Committee Meetings, and Board Meeting.

R. A. Thompson (personal communication, October 13, 1992) thanked Dr. Johnson for chairing the panel and stated "the program looks terrific". For additional panelists, "your wide acquaintance with so many reading people around the world and presentation experiences in so many places make you the ideal person to select participants."

B. S. Townsend (personal communication, November 9, 1992) stated in a letter to Dr. Thompson that the BRI SIG received approval from the Board of Directors of the IRA, with program time as scheduled in San Antonio. R. A. Thompson (personal communication, November 20, 1992) relayed this good news to charter BRI members and stated, "our Program Chairman, Dale Johnson, has put together an excellent program." Dr. Thompson and Dr. Rouch encouraged every member to serve in some capacity and to bring friends to San Antonio.
CHAPTER IV
THE EXPANSION OF BALANCED READING INSTRUCTION 1993-1994

The BRI organizational meeting April 28, 1993, at San Antonio included a welcome and introduction to the BRI SIG by Dr. Richard Thompson and Dr. Roger Rouch. The panel, "Finding the Best of Both Worlds," was moderated by Dr. Dale Johnson with Dr. Dixie Spiegel, Dr. Marilyn Adams, and Dr. Alton Greenfield addressing the need for decoding skills instruction and balanced reading in general. The round table topics were followed by committee and business meetings with Dr. Thompson elected as chair. The BRI program chaired by Dr. Johnson was a huge success. Over 200 people "showed their appreciation by staying and standing in every foot of floor space in our room and the adjoining one from which they could view the proceedings through a crack in the moveable wall" (R. A. Thompson, personal communication, May 18, 1993).

In the BRI Newsletter (June 12, 1993) Dr. Thompson looked forward to the "friendship, collegiality, and willingness to band together to discuss, research, and evolve the best balanced reading
practices for the good of students everywhere". The newsletter summarized the committee reports and actions at San Antonio. The Constitution and By-Laws Committees submitted proposals that were approved which included the following BRI principles; there should be balance between:

- Teaching students and facilitating their learning
- Employing reading instructional approaches and open reading activity time
- Using code and meaning methodologies
- Employment of incidental one on one intervention strategies and development of planned lessons
- Using trade books and published teaching materials
- Using informal observations and utilizing formal assessing instruments
- Use and awareness of language

The Program Committee recommended an "institute" proposal to IRA, in addition to the BRI SIG program proposal for the May, 1994, Toronto, Canada IRA Convention, which were accepted. The Institute for 150 registrants was entitled "Instructional Balance for Reading, Writing, and Literacy Development," and was co-chaired by Dr. Marilyn Adams, Dr. Jean Osborn, and Dr. James Wiley (See the Institute Program in
Appendix A). The regular BRI SIG session was open to all conferees with the keynote address and the concurrent mini-sessions well received (See Appendix B).

The Publications Committee recommended that the BRI Newsletter and BRI Journal be the principal means to communicate and to effect change in instructional methods. "The purpose of Balanced Reading Instruction is to provide a writing forum for the exchange of research, information, and opinion on theory and practice in teaching reading. This journal places a particular emphasis on a philosophy of teachers balancing the reading instructional programs to provide for the continuum of needs revealed by students for their growth in reading skills development" (BRI Journal, Spring, 1994), (See Appendix C).

The final chapter speculates about the future implications for Balanced Reading Instruction. Teachers will develop a balanced instructional plan for each child and modify the curriculum to meet the needs of the learners daily.
CHAPTER V
THE FUTURE OF BALANCED READING INSTRUCTION

The BRI movement has grown and developed with considerable interest and support among educators in the English speaking countries the last several years. Proposals have been submitted for another successful BRI SIG meeting April 30 - May 4, 1995, at the Anaheim, CA. IRA Convention.

The acceptance of this energizing BRI movement by educators has been based on perceived weaknesses and a lack of balance in the whole language concept. Johnson (1993) refutes the whole language belief that written language is learned as naturally as oral. "We know that children learn to speak without being taught, but only later do they learn to read and write. Every physically and mentally healthy human being in the world knows how to speak - while writing is an advanced technology and many humans never master written language" (p.8).

Thompson (1993), states Goodman's principal data collecting instrument, the Reading Miscue Inventory, was found to be unreliable in the following study. Anne E. Wolfe (1978), in her
dissertation study at the University of Wisconsin found that the scores tend to fluctuate due to situations that vary over time because of true subject differences and large test error (p.5).

Jerrolds & Thompson (1992) identify seven fundamental problems in the whole language philosophy. First, if children can learn to speak by listening and imitating people, then they will naturally learn to read and write if they are in a reading and writing environment. Then illiteracy would not be a problem in the classroom, if this righteousness or naturalistic learning were true.

The second weakness is immersion... students will learn to read by being immersed in real books. As with osmosis, the theory is just to let children read and they will learn. However, BRI educators stress skill based learning in reading is more effective and efficient through demonstration, instruction and practice, as with football or swimming.

Whole language stresses the convenience of teaching reading skills only as students encounter problems in the text. Students skip words they do not know and try to determine their meaning from the context. Therefore, the students do not always understand the authors' meaning. The student guesses at the word and perceives its meaning using whatever tools are available. To obtain the meaning of words, a student must use all relevant
information. Successful reading requires awareness and mastery of alphabetical principles. Leaving the learning of sounds and symbols to chance is dangerous to students' knowledge.

A fourth weakness suggests a teachers' sense of liberation from basal readers. An effective teacher has never had the constraint of a basal reader or any other one method. With the numerous approaches to reading instruction, following a single program regardless of students' abilities has always been inconceivable, since 165 approaches to beginning reading instruction have been identified (Aukerman, 1984).

Whole language is portrayed as a simplistic means to teach reading. Skill development is not discussed. Individualized instruction in used as the need arises. The students' skill development is never measured to identify shortcomings. Thompson (1993) states "pushing the responsibility for learning reading skills on the learners is inappropriate. Skill grouping is a tried and true teaching tactic" (p.9).

The whole language philosophy is one dimensional. The whole sentence meaning method is used to the exclusion of code methodologies. Students learn enough phonics from reading and incidental instruction given as students read aloud. Accuracy of spelling and understanding are no longer important goals.
Students may later face textbook learning with more difficulty and ineffectively deal with workplace literacy.

"Knowledgeable reading specialists know there are five reading methodologies which can be classified into two groups: decoding and meaning. They know the decoding methodologies are alphabetic, phonics, linguistic or multiple clues; and the meaning methodologies are whole word (look-say) and whole sentence...it is prudent to use both a code and a meaning approach to take advantage of the strengths of each and minimize their weakness" (p.5).

The final weakness of whole language is the propaganda appeal. The message conveyed is that whole language has been used in New Zealand, Australia, and England so successfully that all English speaking people should be taught using this strategy. The statement that there is universal literacy in these countries needs verification. All English speaking countries have reading problems. In New Zealand, one of four first graders is in Reading Recovery.

Thompson (1993) states that reading achievement is declining in schools where whole language has been promoted. England has gone to national testing for the first time in its history, and colleges of education are being threatened with abolishment. New Zealand is considering adopting the same
testing measure. The comfort level that whole language teachers felt as they abandoned teaching reading systematically is being replaced with legitimate concern for their students' welfare" (p. 8).

In the United States, the most recent National Assessment of Educational Progress (NAEP) results reveal shocking inadequacies in reading and writing achievements of American students. These assessments are representative samples of students in grades four, eight, and twelve in both private and public schools. These most recent NAEP assessments are recorded in two government publications, *NAEP 1992 Reading Report Card for the Nation and the States* (September, 1993) and the *NAEP 1992 Writing Report Card* (June, 1994).

Data from the most recent NAEP report cards in reading and writing reveal a majority of American fourth graders have difficulty with interpretive literacy tasks. Johnson & Johnson (1994) recommend a four-part teaching procedure for the three dimensions of interpretive comprehension (i.e., inferential, referential, and critical). This demonstrated procedure motivates students to engage in informative, narrative, and persuasive writing styles.

M. T. Nunn, (personal communication, July 18, 1994) believes balanced approaches to reading are necessary due to the
different learning styles of students. Some students learn to read without being taught skills, but it is a more efficient use of instructional time to teach skills, especially for the at risk students.

As the 1991 Minnesota Middle School Educator of the Year, M. Nunn states that students learn in visual, auditory, or kinesthetic methods (VAK). Visual learners will learn well in whole language, but auditory learners will be handicapped. As in football, you can learn to play just "playing", but it makes more sense to teach skills that make up blocking, passing, or tackling. Likewise, the reading instruction skills of vocabulary, context, or phonics are best "taught, rather than caught".

Reading skills must be at an automatic level, before a student can concentrate on comprehension. If a student cannot read a word, the greatest literature will have no meaning. Many Minnesota school districts are whole language mandated. As School Counselor at Mound, MN, M. Nunn indicates the experienced reading teachers continue to teach reading skills out of the closet in a balanced approach.

W. H. Nunn (personal communication, July 18, 1994), Professor Emeritus at St. Cloud State University, states that whole language is a fad that will fade. In order for BRI to be on the cutting edge in reading instruction, it must be a teachable and
usable balanced program to withstand future trends in the reading field.

Spiegel (1994) says reading is usually described in contemporary views as a constructivist process. "Meaning does not reside in the text but is built or constructed through the interaction of four factors: the author, the text that the author has produced, the reader, and the situation or context within which the reading occurs. Mature readers have strategies that enable them to construct meaning from text successfully. For example, mature readers know how to integrate their prior knowledge with information from the text; they know how to utilize or impose text structure in order to facilitate comprehension and retention of what is read; they understand the crucial importance of interactive reading, through which the reader predicts, questions, and reacts to text, all the while monitoring his or her understanding"(p. 6).

Educators sometimes approach literacy development as though children all learned the same way. School districts, textbook companies, and theorists may stress "the" way. There is no one way or approach to develop literacy. Literacy teachers must find the balance for each child, and modify the curriculum daily to fit the needs of the learners.

Whole language advocates state readers recognize words better in contextual material than in list form. Nicholson (1992)
states "The first point to make is that whole language researchers see the reading process as a guessing game, when that is not the case. If guessing was a major strategy in reading, then good readers would be more reliant on guessing than poor readers. Yet numerous studies have shown that poor readers are just as reliant on guesswork as good readers, if not more so" (p.92).

Nicholson (1992) further believes "...there have been other studies, using more natural contexts, showing that Goodman overestimated the benefits of reading words in context. These replication results also showed that good readers were just as good at reading words in lists as they were in context, and in some cases, were actually better in lists... These findings do not fit the whole language approach" (p.93).

Walmsley and Adams (1993) raised several concerns involving whole language instruction. Teachers, they found, were unanimous in their view that whole language is tremendously demanding, more so than traditional basal reading instruction. Teachers were amazed by how much there is to building a library of trade books, individualized instruction, and locating and making materials. Managing whole language instruction is a major issue facing whole language teachers. Whole language is an instructional philosophy that does not come with a set of packaged materials. There are many activities associated with its
instruction that teachers are left on their own to implement. In addition, they must determine what goals are to be accomplished through this implementation.

The whole language curriculum is child-centered, not teacher-dominated. Many teachers have struggled with the consequences of this concept (e.g., increased classroom noise and movement). Teachers have difficulty locating appropriate materials, supplies, and layout of the classroom to allow for reading and writing areas.

Teachers also have the challenge of covering the traditional curriculum aspects that their schools insist be taught (e.g., phonics, spelling, and grammar rules). The whole language approach places the burden of teaching on the teachers' shoulders; the program comes from her head, not from published materials.

Administrators support whole language as a set of new teaching techniques, unaware of the challenges that it poses to traditional ways of teaching, assessing, and organizing language arts. Administrators also face the pressures and challenges of traditional assessment and accountability mandated by the district or state.

Most whole language teachers are not "purist" whole language teachers. To some degree, teachers compromise by adding whole language activities to traditional programs or
supplementing their whole language program with traditional materials. By modifying their program, they arrive at Balanced Reading Instruction.

**BRI is taking the strengths of the traditional phonics and the basal reader and adding the strength of whole language with its self-directed reading approach and in proposing balanced reading. The future of BRI will be in striking the correct mix of these strengths. The makeup of BRI may, and should, vary from school to school and class to class. Each teacher will measure the reading and writing skills of the students and develop a balanced plan for instruction.**

Our culture and knowledge are based on reading and writing skills. As we view history, we can identify outstanding individuals in every age that have added enormous contributions to the world's growth and development. As we develop our communication skills with improved reading and writing instruction, we can only wonder how many more giants like Socrates, Leonardo da Vinci, Abraham Lincoln, Marie Curie, Helen Keller, and Albert Einstein could have developed with an improved reading and writing instructional balance.

The ultimate goal of all education is not just literacy, but the development of all students to reach their fullest potential using a balanced plan for instruction. Johnson (1993) gave the
following tips for teachers: "Do the best you can in the ways that work best for you, and lives will be effected in positive ways. If you teach phonics, some will learn. If you use a basal, some will learn. If you subscribe to whole language beliefs, some will learn. Don't dissipate your energies and contribute to your already over-stressed life by agonizing over competing methodologies or philosophies and do what you do best!" (p.13).
REFERENCES


Balanced Reading Instruction Newsletter, (June 12, 1993). 1(1).


Appendix A

INSTITUTE
Instructional Balance for Reading, Writing, and Literacy Development
INSTITUTE 11
SUNDAY MAY 8
INSTRUCTIONAL BALANCE FOR READING, WRITING, AND LITERACY DEVELOPMENT

Intended for classroom teachers, researchers, teacher educators, supervisors, and administrators, preschool-grade 8.
Special registration is required, with a limit of 150 registrants.

Cochairing: Marilyn Jager Adams, Bolt Beranek & Newman, Cambridge, Massachusetts; Jean Osborn, University of Illinois, Urbana-Champaign; James W. Wiley, Baylor University, Waco, Texas

ROYAL YORK, CONCERT HALL
Sunday/9:00 a.m.-5:00 p.m.*
Welcome
   Richard Thompson, University of Central Florida, Orlando
Opening Remarks: The Importance of Balance for Our Students and Our Profession
   Marilyn Jager Adams
Overview of Workshops
   Anne McGill-Franzen, Richard Allington, State University of New York, Albany; Patricia Cunningham, Wake Forest University, Winston-Salem, North Carolina; Roselmina Indrisano, Boston University, Massachusetts; Isabel Beck, University of Pittsburgh, Pennsylvania; Carl Bereiter, Ontario Institute for Studies in Education, Toronto
Workshops: Round 1

1. Developmentally Appropriate Literacy instruction for the Early Years
   Anne McGill Franzen; Jill Campbell, Albany City Schools, New York

2. Balancing Reading, Writing, and Instruction in the Primary Grades
   Patricia Cunningham; Dorothy Hall, Winston-Salem Forsyth County Public Schools, North Carolina

3. An Integrated Model for Literacy Instruction in the Primary Grades: The Boston University/Chelsea Public Schools Partnership
   Roselmina Indrisano; Denise Maresco, Nancy Birmingham, Chelsea Public Schools, Massachusetts

4. Lifting the lid off Texts: Questioning the Author
   Isabel Beck; Margaret McKeown, University of Pittsburgh, Pennsylvania

5. Balancing "Once Upon a Time" and "Scientists Say"
   Richard Allington

6. Developing Literacy Through Reading, Writing, and Knowledge Building
   Carl Bereiter; Marlene Scardamalia, Ontario Institute for Studies in Education, Toronto

Workshops: Round 2 (all workshops repeated)

Open Discussion: Issues in Balance
   Moderator: Jean Osborn

Closing Plenary: Gaining Perspective on the Challenges of Balance
   P. David Pearson, University of Illinois, Urbana-Champaign
Appendix B

BRI Special Interest Group Program
INTERNATIONAL READING ASSOCIATION CONFERENCE
TORONTO, CANADA

Tuesday, May 10 - 2:00-4:45 p.m.

SPECIAL INTEREST GROUP 14
SHERATON CENTRE, GRAND BALLROOM

CENTRAL

**Balanced Reading Instruction** Open to all conferees.
*Organizer and chairing:* Dixie Lee Spiegel, University of North Carolina, Chapel Hill

Introduction, Overview
*Speakers:* Richard Thompson, University of Central Florida, Orlando; Dixie Lee Spiegel

**Keynote Address:** Exploring the Balance in Student engagement with Text
*Speaker:* Linda B. Gambrell, University of Maryland, College Park

**Keynote Address**
*Speaker:* To Be Announced

Concurrent Minisessions

Something Old, Something New: Providing a Balanced Approach to Remediation in a University Reading Clinic
*Speaker:* Eugene Cramer, University of Illinois, Chicago

Strengthening Comprehension Instruction Through I-Messages
*Speaker:* Shirley Freed, Andrews University, Berrien Springs, Michigan

Balanced Reading Instruction in the Classroom
*Speakers:* Roger Rouch, St. Cloud State University, Minnesota; Richard Thompson

Additional Minisessions
*Speakers:* To Be Announced

Business Meeting
Appendix C

*BRI Journal
Editors and Staff
The purpose of Balanced Reading Instruction is to provide a writing forum for the exchange of research, information, and opinion on theory and practice in teaching reading. This journal places a particular emphasis on a philosophy of teachers balancing their reading instructional programs to provide for the continuum of needs revealed by students for their growth in reading skill development. The scope of Balanced Reading Instruction will include discussion on the values associated with teachers providing reading and literacy instruction in general that balances teaching and facilitation of student learning, different approaches and methods, use and awareness of language, incidental intervention and planned lessons, trade books and published teaching materials, formal and informal assessment. The journal will publish research articles, theoretical papers, case studies, critical reviews, teaching ideas, and book reviews.

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