

Study Guide

K-2

# SHIFTING THE BALANCE

6 Ways to Bring the Science of Reading  
into the Balanced Literacy Classroom

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Professional development training for  
teachers provided by Stenhouse Publishers



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## Summary

In *Shifting the Balance*, authors Jan Burkins and Kari Yates address the ongoing disagreements about how to teach reading as a critical opportunity to look closely at the research, reevaluate current practices, and embrace new possibilities for an even stronger enactment of balanced literacy.

By pinpointing gaps and overlaps—as well as common misunderstandings and missed opportunities between the competing lines of thought—Jan and Kari offer busy educators direction and clarification for integrating science and balance into their daily instruction, while keeping meaningful experiences with text a priority.

Across six shifts, each chapter

- identifies a common instructional practice to reconsider
- explores various misunderstandings that establish and keep that practice in play
- shares scientific research to support its reconsideration
- proposes an instructional shift to apply a new perspective, and
- details several high-leverage instructional routines to support implementation of that shift.

This guide is designed as an invitation to reflect, examine, and explore new thinking. The following are suggestions to support groups of educators as they read, discuss, and extend the ideas from *Shifting the Balance* into their classrooms. These ideas will come to life as teachers are given opportunities to put them into practice with students. With that in mind, we have developed discussion questions, pulled conversational quotes, and ideas for next steps as you reflect on the main points in each chapter.

This study guide is designed to be used with a group of teachers as part of a professional study group, but it could easily be used as a reflective tool for those reading the book alone. Our hope is that the guide will foster collaboration, spark new thinking, and support the transfer of new ideas into the classroom.

# Introduction

## Embracing Science and Balance

### Reflective Questions

- What are your experiences in working with students who have had difficulties learning to read?
- Would you say your beliefs in teaching reading are aligned to those of balanced literacy or the science of reading? Or are you somewhere in the middle?
- Are you open to making shifts in your own instructional practice? What are your non-negotiables?

### Reading Excerpt

Jan and Kari have chosen to explore the national conversation around early literacy instruction and share a pathway for readers to reflect and explore new possibilities.

- Read *Bravely Embracing Research and Balance* (pages 3–4).
- As you read, reflect on the following questions that Jan and Kari pose within the text.
  - Is it possible that balanced literacy classrooms are sometimes a bit out of balance when it comes to understanding and promoting research-aligned instruction?
  - Could it be that we are missing (or misunderstanding) compelling opportunities to bridge research to instructional practice in the reading classroom?
  - Do we have some seemingly logical practices that are driven more by our intuition about how reading appears to work from the outside than they are driven by the science of how reading actually works in the brain?
  - Is it possible that a few simple, but powerful, shifts could help us unlock literacy for more children than ever before, especially those for whom the current system does not work, or does not work well enough?
- Jot down your thinking as you read. Use these notes to launch a conversation as a study group or document your personal journey as you read the text.

### Quotes Worth Discussing

*“Chances are there are children experiencing reading difficulties in your own school, as well. And probably, if your data is reflective of historic and national trends, a disproportionate number of the children having reading difficulties are children of color, and/or from marginalized communities.”*

—page 1

*“Many educators—whether ‘balanced literacy’ or ‘science of reading’ proponents—are gravely concerned and committed to disrupting systems that perpetuate reading failure.”* —page 2

*“All children, especially those locked into systems that seem to guarantee their failure (Minor 2018), need access to both the secrets of the alphabetic code and relevant experiences with texts. They need both explicit information about how reading works and immersive experiences that show them how to leverage reading and writing to change the world.”* —page 2

### Putting Ideas Into Practice

- What do you hope to get out of this book? What questions would you like answered? Jot down your thinking and discuss your next steps as a group.

# Shift 1

## Rethinking How Reading Comprehension Begins

### Reflective Questions

- Which of the misunderstandings in this shift did you find yourself thinking more deeply about?
- How do you make space for student conversation and contributions during read-aloud?
- How might you integrate more extensive vocabulary into the language of your classroom?

### A Look Inside a Classroom

This is a look inside Mr. Tucker's classroom during morning routines and read-aloud. Mr. Tucker shares the observation that, as his students move into books with more complex content and vocabulary, their reading comprehension seems to drop off despite the fact that the students read the words of the text with ease.

- Using a two-column note (How is this similar/different to your own experiences?), jot down your thinking as you read (pages 9–10). Use these notes to launch a conversation as a study group or document your personal journey as you read the text.

### Reading Excerpt

- Read *Misunderstanding: Reading comprehension begins with print* (pages 12–15). This section provides an overview of the three processing systems involved in listening comprehension.
- As you read, use a two-column note (What do you notice? What do you wonder?) to hold your thinking. These notes can be used to launch a discussion as a study group or document your personal journey as you read the text.

### Quotes Worth Discussing

*"Listening comprehension—which is built through language interaction—is after all, an essential precondition of reading comprehension."* —page 11

*“Reading comprehension actually involves translating the words on the page into spoken language and “listening to them,” aloud or saying them in our heads.” —page 16*

*“It means that in the early years, while children are learning to read—with texts that are necessarily well below their listening comprehension capacity—we must have an eye toward the future, focusing on stretching the limits of listening comprehension through oral language development and knowledge building.” —page 21*

### **Toolbox**

Read *Zooming in on Repeating and Expanding* (pages 29–30). Dialogic conversations are a strategy to increase oral language in children. Figure 1.5 includes a description of the steps, a sample conversation, and some tips for trying this process. Try out this strategy within the study group setting. To download a PDF of this tool, go to [TheSixShifts.com/downloads](https://TheSixShifts.com/downloads).

### **Putting Ideas Into Practice**

- Read *Meanwhile, Back in the Classroom* (page 31). Notice how Mr. Tucker used the strategy of dialogic conversations (engages, listens, repeats, and expands) with students as part of his morning routine.
- Read through *Recommendations for Making the Shift* (pages 23–30). What might be your next step for supporting oral language development? Jot down your thinking. Share next steps as a group.

## Shift 2

### Recommitting to Phonemic Awareness Instruction

#### Reflective Questions

- Which of the misunderstandings in this shift did you find yourself thinking more deeply about?
- Which of the phonemic awareness routines are you already using intentionally?
- Do you know how well individual students can pronounce, locate, and manipulate individual phonemes in different locations within words? What do you need to do to establish or refine your simple formative assessment measures of phonemic awareness?

#### A Look Inside a Classroom

This is a look inside one of Ms. Martin's professional learning community meetings. At this meeting the group reflects on the district's phonemic awareness assessment. As Ms. Martin listens to the conversation, she realizes that she's a bit foggy on the differences between the terms phonological awareness and phonemic awareness. She becomes curious about what the phoneme segmentation results really mean and how she might use them to adjust her instruction.

- Using a two-column note (How is this similar/different to your own experiences?), jot down your thinking as you read (pages 33–34). Use these notes to launch a conversation as a study group or document your personal journey as you read the text.

#### Reading Excerpt

- Read *Misunderstanding: Phonemic awareness and phonics are the same thing* (pages 38–39). This section explains these terms and helps readers keep the definitions straight.
- As you read, use a two-column note (What do you notice? What do you wonder?) to hold your thinking. These notes can be used to launch a discussion as a study group or document your personal journey as you read the text.



### Quotes Worth Discussing

*“But, teaching letter names and sounds (phonics) without a strong and intentional focus on helping kids learn to pry spoken words apart and put them back together (phonemic awareness) might be one of the places that our early literacy instruction is a bit out of balance.” —page 40*

*“In fact, research confirms that a lack of strong phonemic awareness is a contributing factor to the majority of reading difficulties. But the reverse is also true: with early and intentional instruction in phonemic awareness, many reading difficulties can be avoided altogether.” —page 42*

*“Beginning in kindergarten and continuing through first grade (and even beyond) it is urgent for all students to have consistent opportunities to develop, deepen, and apply phoneme level skills, such as phoneme segmentation or substitution.” —page 46*

### Toolbox

Read *Zooming In on Segmenting with Elkonin Boxes* (pages 56–57). This strategy is designed to help students learn to segment the phonemes in a word as they push chips and, eventually, letters into the boxes. Practice this strategy with your study group.

### Putting Ideas Into Practice

- Read *Meanwhile, Back in the Classroom* (page 61). Notice how Ms. Martin provided new opportunities for her students to practice targeted phonemic awareness throughout the day.
- Read through *Recommendations for Making the Shift* (pages 49–60). What might be your next step for committing to phonemic awareness instruction? Jot down your thinking and discuss these next steps as a group.

# Shift 3

## Reimagining Ways to Teach Phonics

### Reflective Questions

- Which of the misunderstandings in this shift did you find as the most thought provoking?
- How much time do you dedicate in your schedule for whole-group and small-group phonics instruction? Is it enough to allow an explicit and systematic approach to teach to mastery?
- Which high-leverage instructional routines for blending, segmenting, and word building are you most comfortable with? Which do you want to practice or explore further?

### A Look Inside a Classroom

This is a look inside Ms. Lin's classroom. She has just gathered her students on the carpet for a phonics lesson. As she reflects on the lesson, she senses that there is a disconnect between her whole-group phonics instruction and students' application of phonics principles during guided and independent reading.

- Using a two-column note (How is this similar/different to your own experiences?), jot down your thinking as you read (pages 63–64). These notes can be used to launch a discussion as a study group or to document your personal journey as you read the text.

### Reading Excerpt

- Read *Misunderstanding: Strengthening phonics instruction means purchasing a program* (pages 67–70). This section shares design considerations to keep in mind as you create or evaluate your own scope and sequence for phonics instruction.
- As you read, use a two-column note (What do you notice? What do you wonder?) to hold your thinking. These notes can be used to launch a discussion as a study group or to document your personal journey as you read the text.

### Quotes Worth Discussing

*“What really matters is a strong and research-informed scope (what you will teach) and sequence (what order you will teach it), alongside solid instructional routines (how you will teach), whether homegrown or purchased.” —page 67*

*“Children must also understand that letters are spoken sounds written down (alphabetic principle), how to blend those sounds and “make the leap” to a known word (set for variability), and how to use those blended words as a bridge back to meaning.” —page 72*

*“The brain is a natural puzzle solver and releases endorphins when we solve a problem. It loves to find patterns and figures things out, and it is wired to reward us for our efforts. So, as children use the secrets we’ve taught them for cracking bits of the code—noticing, comparing, and applying phonics patterns—their brain can reward them for their efforts.” —page 74*

### Toolbox

Read *Let assessment guide you* (pages 84–85). How might you informally, but systematically, assess the phonics needs of your students to better inform your instruction? Talk about this as a study group.

### Putting Ideas Into Practice

- Read *Meanwhile, Back in the Classroom* (pages 86–87). Notice how Ms. Lin decided to administer a quick weekly spelling dictation to help assess the needs of her students. This informal spelling measure guided her planning of phonics instruction.
- Read through *Recommendations for Making the Shift* (pages 76–85). What might be your next step as you reimagine phonics instruction? Jot down your thinking and discuss those next steps as a group.

# Shift 4

## Revisiting High-Frequency Word Instruction

### Reflective Questions

- What were you previously taught about high-frequency word instruction? How is the learning in this shift similar to (or different from) this?
- How might you go about identifying high-frequency words that are completely regular (decodable) and embedding them into your aligned phonics instruction?
- How are you currently collecting data about student knowledge of irregularly spelled high-frequency words? How do you use this information to inform your instructional choices?

### A Look Inside a Classroom

This is a look inside Ms. Ellis' classroom. She has just gathered a group of first graders to work with the high-frequency word *does*. After several activities in which the students work with the word, she is confident that the students know the word. She then passes out the new guided reading text only to have one student stuck on *does*!

- Using a two-column note (How is this similar/different to your own experiences?), jot down your thinking as you read (pages 89–90). Use these notes to launch a conversation as a study group or document your personal journey as you read the text.

### Reading Excerpt

- Read *Misunderstanding: Sight words are the same as high-frequency words* (pages 91–93). This section explains how all high-frequency words can be sight words, but that not all sight words are high-frequency words.
- As you read, use a two-column note (What do you notice? What do you wonder?) to hold your thinking. These notes can be used to launch a discussion as a study group or document your personal journey as you read the text.

### Quotes Worth Discussing

*“Sight words, referred to as “brain words” are simply all the words, not just high-frequency words, that we have come to know through sight, sound, and meaning and have stored away in the visual word form area of the brain for quick retrieval.” —page 91*

*“Although it is true that some high-frequency words are less decodable, or rule-governed, than others, all words have some degree of decodability, even the most irregular ones.” —page 93*

*“Taking the spoken word and the written word apart and then matching up the two--phonemes and graphemes—is how the spelling of a word gets locked in long-term memory.” —page 95*

### Toolbox

Read *Zooming in on Orthographic Mapping* (pages 103–105). Practice the strategy within your study group. How might you make orthographic mapping a part of your instruction practice (shared reading, interactive writing, small-group instruction, etc.)?

### Putting Ideas Into Practice

- Read *Meanwhile, Back in the Classroom* (pages 106–107). Notice how Ms. Ellis incorporated orthographic mapping into her classroom instruction.
- Read through *Recommendations for Making the Shift* (pages 100–106). What might be your next step to adjusting your high-frequency word instruction? Jot down your thinking and discuss those next steps as a group.

## Shift 5

### Reinventing the Ways We Use MSV (3 Cueing Systems)

#### Reflective Questions

- What is your experience with MSV, and how does the information in this shift align with or disrupt it?
- How do you ensure that students have ample processing time before you offer prompts or other supports?
- In your current practice, when do you notice yourself prompting students to reread? How might you support students in developing habits for systematically rereading at the word and/or sentence level and leveraging oral language for sense making?

#### A Look Inside a Classroom

This is a look inside Ms. Sanchez's classroom. She is listening in and coaching her group of second graders as they read their guided reading book. Despite displaying a strategy chart that reminds readers of the strategies she has taught them, Ms. Sanchez has noticed that her students still encounter too many unproductive detours and dead ends.

- Using a two-column note (How is this similar/different to your own experiences?), jot down your thinking as you read (pages 109–110). These notes can be used to launch a discussion as a study group or to document your personal journey as you read the text.

#### Reading Excerpt

- Read *Misunderstanding: We need to avoid telling students to “sound it out”* (pages 115–116). This section is about prioritizing print as a first resort for word solving, using meaning and structure to cross-check.
- As you read, use a two-column note (What do you notice? What do you wonder?) to hold your thinking. These notes can be used to launch a discussion as a study group or document your personal journey as you read the text.

### Quotes Worth Discussing

*“By teaching children to start with print and to follow their print attempts with checking any or all of the three cueing systems, you reinvent the MSV model making it VMS, and better aligning it with science, including the Simple View of Reading.”* —page 117

*“It turns out the real value of decoding a word is not figuring out the word! The underappreciated yet critical value in any encounter with an unknown word, especially for beginning readers, is how it adds to children’s learned store of letters sequences, preparing them to read future words fluently.”*  
—page 120

*“Rereading is really ‘listening again’ during reading. So, when readers are encouraged to reread, thinking about whether their attempt makes sense or sounds right, they are tapping into their listening comprehension to check on the decoding.”* —page 127

### Toolbox

Read *Zooming in on Starting with Visual Information* (pages 124–126). This strategy teaches a process for encountering unknown words. The strategy has students using visual information as the first step in the decoding process. Figure 5.7 offers some specific language examples to use with children to help them practice the VMS path. You can also download a copy at [TheSixShifts.com](https://www.stenhouse.com/TheSixShifts.com). Try out this process with your study group using an unknown word. How does the process work for you as adults?

### Putting Ideas Into Practice

- Read *Meanwhile, Back in the Classroom* (pages 130–132). Notice how Ms. Sanchez had made adjustments to her practice by teaching students a systematic strategy of looking closely at letters and sounds for tackling unknown words.
- Read through *Recommendations for Making the Shift* (pages 122–130). How might you prioritize print as a strategy of first resort for word solving and meaning and structure to cross-check? Jot down your thinking and discuss your next steps as a group.

# Shift 6

## Reconsidering Texts for Beginning Readers

### Reflective Questions

- What types of texts do you currently use with beginning readers? Predictable? Decodable? A mix of both?
- What are the advantages and limitations of the texts you are currently using? How can you use those texts differently to off-set the limitations you've identified?
- What types of texts might you advocate to have added to your school's book room or classroom collection?

### A Look Inside a Classroom

This is a look inside Ms. Quinn's classroom during her literacy block. Students spend time with self-selected books as well as books that Ms. Quinn selects for small group instruction.

Ms. Quinn sometimes feels like the predictable patterns in beginning texts give students a false sense of success when they have simply memorized the pattern. She has also noticed that many students seem to just go through the motions when independently reading.

- Using a two-column note (How is this similar/different to your own experiences?), jot down your thinking as you read (pages 135–136). Use these notes to launch a conversation as a study group or document your personal journey through the text.

### Reading Excerpt

- Read *Misunderstanding: Decodable texts are loaded with problems* (pages 138–140). This section explores the three tensions (decodability versus predictability, novelty versus redundancy, orthographic value versus sense-making value) we should consider when sharing texts with beginning readers.
- As you read, use a two-column note (What do you notice? What do you wonder?) to hold your thinking. These notes can be used to launch a discussion as a study group or document your personal journey as you read the text.



### Quotes Worth Discussing

*“So, decodable texts, although initially requiring more effort, can serve as an important transitional tool that can help beginning readers use the power of print to move from the partial to the full alphabetic phase of word recognition.”* —page 144

*“Of course, meaningful conversation about the ideas in these little texts is certainly important, but we need to keep in mind that the most meaningful early work in comprehension happens in read-aloud, shared reading, and classroom conversation.”* —page 145

*“But much of the benefit of independent reading can be lost if students don’t spend the majority of their time with texts that match their current skills as readers. Of course, even the most beginning readers can read trade literature, such as picture books and rich informational texts, in ‘other ways’—talking about illustrations and making up or retelling stories. It’s also critical, however that readers have lots of time with texts that set them up to ‘read all the words.’”* —page 145

### Toolbox

Read *Zooming in on Text Choice* (pages 150–151). This section considers the three tensions when analyzing the features of emergent-level texts. Figure 6.8 is intended to help you consider where individual texts fall along these continuums. You can also download a copy at [TheSixShifts.com](https://www.stenhouse.com/TheSixShifts.com) if you would like to jot down notes as you evaluate texts. Talk about this process of text selection as a group.

### Putting Ideas Into Practice

- Read *Meanwhile, Back in the Classroom* (pages 156–157). Notice the intentional adjustments that Ms. Quinn has made in text selection for her beginning readers.
- Read through *Recommendations for Making the Shift* (pages 148–156). How might you reconsider the texts you use with beginning readers? Jot down your thinking and discuss your next steps as a group.

## Reflective Questions

Now that you have finished the book, what are your thoughts?

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Did you find yourself questioning your beliefs and practices in teaching reading to our youngest learners?

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What adjustments might you make to your instructional practices?

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**Continuing the Conversation**

- Make an action plan for your next steps.
- Continue these conversations with colleagues.
- Pay attention to your energy as you go and be kind to yourself along the way.
- Share your thinking about the book and join in on the ongoing conversation with Jan and Kari on Twitter: @Kari\_Yates and @janmilburk (#TheSixShifts).