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# Embedding Self-Regulation Strategy Instruction Into The Genre-Based Writing Curriculum

Peter Hagenson  
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EMBEDDING SELF-REGULATION STRATEGY INSTRUCTION  
INTO THE GENRE-BASED WRITING CURRICULUM

by

Peter Hagenon

A capstone submitted in partial fulfillment of the requirements  
for the degree of Masters of Arts in English as a Second Language

Hamline University

St. Paul, Minnesota

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Peer Reviewer: Heidi Alcaide García

“Literacy is the means through which every man, woman, and child can realize his or her full potential.”

– Kofi Annan

“When it is obvious that the goals cannot be reached, don’t adjust the goals, adjust the action steps.”

- Confucius

“Always pass on what you have learned.”

– Master Yoda

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## CHAPTER ONE: INTRODUCTON

### **Introduction**

The following research question is addressed in this paper: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently?

This chapter begins with an explanation of the context in which this project takes place. It then describes the path that led me to the development of the research question, as well as its significance and relationship to several key concepts in education. It ends with a summary of the chapter and an introduction of the content of subsequent chapters.

### **Research Background and Interest**

As an English as a Second Language (ESL) teacher in an urban secondary school, I have struggled to develop a pedagogical approach to writing that I feel meets the needs of all of my English Language Learners. Indeed, the range of skills and educational experiences that my students bring to the classroom is broad. Some have literacy skills in one or more languages other than English. Others have no literacy background. Some had been educated to grade level in their home country, while others had not been to school before coming to the U.S. Some were even born here and have moved through elementary and middle school and still not developed the English skills needed to be exited from ESL services. How could I effectively teach a class of students with so many diverse needs?

My first response to this question was to target one domain of language: writing. Students still engaged with reading, speaking, and listening activities in my classroom,

but they all served to develop ideas and skills that would be put to use in writing. I developed various graphic organizers that students could use to organize their thinking on the page. I had very prescriptive criteria that students needed to meet. The first draft of an essay would be hand written in a packet of graphic organizers that helped them adhere to the structure of an expository essay. I would then provide written feedback on their draft before they typed it up and turned it in. Students were largely unsuccessful. They struggled with the rigid criteria and could not make sense of my feedback, which commented on anything from structure to word choice to grammatical errors. Moreover, the activity guide packets were cumbersome, and learning how to complete the different sections of the packet and how they fit together became the primary focus for students. I needed an approach that allowed me to build on students' writing skills in a more natural way.

My district offers free professional development courses to teachers, and I had the opportunity to take a course about assessment and feedback for English Learners (ELs). In this course, we read work by John Hattie (2007), Black and Wiliam (2006), and others. The information I gained from the course had a significant influence on my teaching practice and ultimately, on the focus of my capstone. The course stressed the importance of identifying clear, challenging, achievable learning targets; helping students set goals to meet those learning targets; giving feedback to students regarding their progress; and providing them with opportunities to assess their own progress. We also learned about Hattie's (2007) four different kinds of teacher feedback: feedback on self, process, task, and self-regulation. While our readings and discussions were not viewing these concepts



through a lens of self-regulated learning, this is where I started being aware of the importance of self-regulation in learning.

I began implementing aspects of what I learned from this course in the classroom. For example, I replaced the prescriptive graphic organizers with more flexible writing checklists. This allowed students more flexibility to meet the requirements of the task with the linguistic skills that they had. I began giving process-oriented feedback aimed at helping students effectively use the tools that I had provided to complete tasks. I limited my feedback to aspects of the task that were stated on the writing checklist and explicitly taught. This new approach shifted responsibility for success onto the students. These changes resulted in students engaging more deeply with the writing tasks, and making more of an effort to use my written feedback to improve their work. The success that I was seeing in the classroom got me interested in studying self-regulated learning strategies.

I began my research with a narrow focus on student self-assessment. This was not so much a strategic choice as it was the result of the focus of the course I had taken on assessment and feedback. I quickly discovered, however, that there is an extensive literature on self-regulation strategies in the field of Second Language Acquisition (SLA), by Chamot (2005), Oxford (2011), and Cohen and Macaro (2007), to name a few. While I was still interested in knowing how to help my students self-assess their writing, I felt as though that was one skill for one task that fit within a much larger web of learning strategies needed to successfully and independently create written texts. I began observing my students more closely as they worked on writing tasks and discovered that many of them were entirely dependent upon my instructions and scaffolds. In some

cases, their skills in the areas of grammar and vocabulary use were more than sufficient for them to be able to express their ideas clearly, yet these skills weren't sufficient for them to write coherent texts. This project represents my efforts to understand how I can develop students writing skills while simultaneously teaching them the strategies that proficient writers employ as they work through the writing process. This task requires that I develop a deep level of understanding of the types of knowledge and skills that students need to be successful writers, the strategies that learners use to self-regulate the writing process and fully engage in learning how to write, and the teaching approaches and strategies to transfer these understandings to students. In other words, it requires me to become a true expert in the area of second language writing development.

### **Significance of the Topic**

This topic is relevant to several key concepts from the field of education, the first of which is equity. Persistent achievement gaps that fall along racial and socioeconomic lines have made equity a major focus of school districts that serve diverse populations. English language learners consistently underperform compared to their mainstream peers. Providing this subgroup with equitable access to learning requires a deep understanding of what they need and how to provide it. Through this project I will attempt to develop such an understanding, and to use it to create an instructional unit that other teachers can use or emulate in their own classrooms.

A second key educational concept to which this project has relevance is the idea of what we might call "soft skills." As an International Baccalaureate (IB) school, my site places a strong emphasis on what IB calls Approaches to Learning (ATL) skills.

ATL skills “support the IB belief that a large influence on a student’s education is not only what you learn but also how you learn” (“Approaches to Teaching and Learning,” 2014). ATL skills include thinking skills, communication skills, social skills, self-management skills, and research skills that are critical to student success in school. They are not necessarily discipline specific, but they are necessary for effective learning across content areas. While IB’s conceptualization of these “soft skills” will not be directly adopted for this project, there is significant overlap between these skills and strategies and those that I will be incorporating into my instructional unit to help students learn to write and self-regulate the writing process. My project will therefore be a model that other teachers can borrow from and emulate as they build explicit instruction of these skills into their instruction.

The final key educational concept to which this project has relevance is disciplinary literacy. Evidence of the growing prominence of disciplinary literacy can be seen in Educational Leadership’s recent dedication of an entire issue to literacy across the curriculum (Rebora, 2017). In addition, the district that I work in recently hosted a mandatory district wide professional development day for teachers dedicated to writing across the disciplines. Undertaking this project will allow me to develop my understanding of the intersection between content area knowledge and literacy. The exact materials that I create will not be intended for immediate use in classrooms across content areas. However, it is my hope that the underlying approach upon which the unit is built, the strategies that are implemented, and the tools that are used to assess for and of student learning will be of use to content area teachers at my site and elsewhere.

## **Summary**

The present research attempts to answer the following question: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently? The impetus behind this question is my observation that many students are completely dependent on my instructions to manage the writing process, coupled with the success that I have seen with the few self-regulation strategies that I have implemented, specifically ensuring that students understand the clear and explicit goals and providing process oriented feedback to help them make revisions. The ultimate goal of this project is to create an instructional unit that integrates explicit self-regulation strategy instruction with the Teaching and Learning Cycle, a pedagogical approach to writing developed by educators and researchers in the field of Systemic Functional Linguistics (SFL). It is my hope that this project will not only transform my own teaching practice and make me a more effective teacher, but that it will also give me the knowledge to help other teachers in my school effectively implement explicit literacy and strategy instruction in their classrooms.

## **Chapter Overviews**

In Chapter 1, I have provided a description of my professional experience and professional learning that shaped the focus of this project. I stated my research question, which is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently? This was followed by a description of my project's significance to the field in the areas of equity, "soft skills," and disciplinary literacy. I also explained how I will be applying my findings to an instructional unit that

integrates explicit strategy instruction with an approach to writing instruction called the Teaching and Learning Cycle.

Chapter 2 begins with a brief overview of its contents. It then discusses some of the challenges that English Learners (ELs) face as they work to develop literacy skills in English. After a discussion of schema theory, which describes the types of knowledge language learners need to have to effectively write in a second language, it goes on to describe the major approaches to writing instruction that have developed over the last 50 years. This is followed by a description of SLF and the Teaching and Learning Cycle, the model of language and pedagogical approach that are adopted as the basis of this project. Next, it briefly discusses the definition of self-regulation before giving an overview of the two major theoretical perspectives on self-regulation strategies. This is followed by a description of Rebecca Oxford's Strategic Self-Regulation (S<sup>2</sup>R) model, which is also a key theoretical framework adopted by this project. Finally, it describes how and why the SFL model of language and pedagogical approach can be fit together to enhance learners' development of academic writing skills.

Chapter 3 begins with a general overview of the project. This is followed by a description of the relevant methodological frameworks adopted for this project, including Wiggins and McTighe's (2005) Understanding by Design (UbD), Systemic Functional Linguistics (SLF), and Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) model, and the rationale for choosing them. It then describes the rationale for the project formant, which is followed by a description of the intended audience. Next, it explains how the UbD framework was used to determine learning goals, identify acceptable evidence of learning, and create the unit learning plan. This is followed by a description of how self-

regulation strategies will be treated throughout the instructional unit. Next, it describes the summative assessment. Finally, it provides a brief description of the project completion timeline.

Chapter 4 begins with a section on the author's key learnings in the areas of writing instruction and strategy instruction that resulted from undertaking this project. This is followed by a section that includes a description of rgw implications of this project, possible future research, the means through which the results of this project will be communicated to others in the professions, and this author's view of the value that this project has for the profession.

## CHAPTER TWO: LITERATURE REVIEW

### Introduction

The purpose of this literature review is to synthesize theory and research in the areas of second language (L2) writing for secondary learners and self-regulated learning in order to inform the development of an instructional unit that combines academic writing instruction and explicit self-regulation strategy instruction. The specific research question addressed in this paper is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently?

The first section of this literature review will discuss key aspects of L2 writing development. It will begin by describing the challenges that English Language Learners face as they attempt to develop literacy skills in their L2. It will then describe how schema theory has provided insights into what learners need to know in order to effectively write in a second language. This is followed by a description of the evolution of L2 writing pedagogy, provided as context for understanding the approach adopted to guide the development of this project. Next, it will turn to a description of the model of language and pedagogical approach put forward by Systemic Functional Linguistics (SLF).

The second section of this literature review will be dedicated to self-regulation and strategy instruction. It will begin with a brief description of self-regulation. This is followed by a discussion about the two major perspectives on self-regulation strategies in the field of education generally and in the field of Second Language Acquisition (SLA) specifically. Finally, it describes Rebecca Oxford's Strategic Self-Regulation (S<sup>2</sup>R)

model, which will be adopted by this author to guide the creation of an instructional unit that embeds self-regulation strategy instruction into a writing curriculum.

The third section of this chapter reviews concepts from SFL and Oxford's S<sup>2</sup>R model that are central to the creation of this project. This is followed by a description of how the SFL concepts of genre, register, and the Teaching and Learning Cycle can be merged with the S<sup>2</sup>R model to create an instructional unit that embeds self-regulation strategy instruction into a genre-based writing curriculum.

### **Second Language Writing Development**

This section of the literature review will discuss key aspects of L2 writing development. It will begin by describing the challenges that English Language Learners face as they attempt to develop literacy skills in their L2. It will then describe how schema theory has provided insights into what learners need to know in order to effectively write in a second language. This is followed by a description of the evolution of L2 writing pedagogy, provided as context for understanding the approach adopted to guide the development of this project. Following a description of the model of language put forward by Systemic Functional Linguistics (SFL), it will describe the relationship between schema theory and SFL. Finally, it will describe the Teaching and Learning Cycle, which is the pedagogical approach to teaching academic genres adopted for this project.

**English learners in secondary schools.** Fu and Matoush (2015) point out that while adolescent learners are more capable than young learners in terms of abstract thinking, metalinguistic skills, and generalizing ability, the challenges they encounter in



secondary school are far greater than those faced by their elementary school counterparts for a number of reasons. Secondary learners experience challenges due to their late entrance into a second-language-dominant community, high academic demands, and limited time to meet graduation requirements. While some English Learners (ELs) in secondary schools may have achieved grade-level literacy in their first language (L1), others may still be developing literacy or may not be literate at all (Ferris & Hedgcock, 2014; Fu & Matoush, 2015; Leki, Cumming, & Silva, 2008). Hedgcock points out that developing literate knowledge can impose substantial psycho-cognitive and sociocultural demands on students whose L2 oral and aural proficiency is emerging and whose L1 literate knowledge is limited (as cited in Ferris & Hedgcock, 2014, p. 16).

Adding to the challenges discussed above is the specialized nature of language in secondary schools. Each discipline area presents ELs with text structures and patterns of language that are likely new to them (Fang and Schleppegrell, 2008). Knowledge that students engage with through language becomes more formalized, complex, and abstract as they advance through high school. It is also true that general education teachers are often not well trained to teach the language of their content area, and an explicit focus on language is often lacking (Gibbons, 2009; Schleppegrell, 2004).

**Schema theory: What do writers need to know?** Developing literacy in a second language requires learning the social practices and cognitive functions needed to decode and produce written text. Ferris and Hedgcock (2014) assert that one of the major distinctions between L1 and L2 learners is their prior experiences with, and expectations of, rhetorical conventions and social functions of texts. Prior knowledge about texts, their genre categories, their purposes, and their formal properties make up a learner's

schematic knowledge. Researchers have classified schematic knowledge into a number of categories. Content schemata refers to the ideas expressed in a text. Content schemata is crucial for L2 readers and writers as incomplete content knowledge can cause significant gaps in the comprehension and production of texts (Ferris & Hedgcock, 2014). Ketchum (2006) describes cultural schemata as knowledge about culture-specific practices, relationships, identities, beliefs, and values (as cited in Ferris & Hedgcock, 2014, p.17). The notion of formal schemata is explained by Smith (1988) as knowledge about how oral and written text is organized (as cited in Ferris & Hedgcock, 2014, p.17). Linguistic schemata include knowledge about morphosyntactic properties and lexical choices associated with specific genres, content areas, and/or topics (Ferris & Hedgcock, 2014).

Citing numerous studies that demonstrate how extensive and sophisticated schematic knowledge facilitates reading comprehension, Ferris and Hedgcock (2014) suggest that a lack of schematic knowledge can significantly impede comprehension and production of written texts. It follows that effective writing instruction for L2 learners must take the learners' schematic knowledge into account when selecting topics and task types, and should aim to build on and deepen existing schematic knowledge about the rhetorical conventions and social functions of various text types. With this goal in mind, I have chosen to adopt a pedagogical approach to writing informed by SFL and promoted by Brisk (2014), Derewainka & Jones (2012) and Gibbons (2007), among others. This approach will be described after a brief discussion of the major developments in writing pedagogy.

**Developments in L2 writing pedagogy.** Pedagogical approaches to L2 writing instruction have undergone numerous developments over the past fifty years. Many of these changes mirror developments in the field of L1 composition (Ferris and Hedgcock, 2014; Wright, 2010). For all of the attention that is paid to literacy development in schools, there is a surprising lack of research on L2 writing development (Christie & Derewainka, 2008; Leki, Cumming, and Silva, 2008). What follows is a summary of four of the major pedagogical approaches to L2 writing, provided here as context for understanding the emergence of the approach promoted by SFL, which is adopted as one of the methodological frameworks for this project.

***Traditional rhetoric.*** An approach that took root in the 1960s, traditional rhetoric, was heavily influenced by audiolingualism, the prevailing L2 instructional paradigm of the day. According to Brooks (1964), audiolingualism viewed writing as a tool for practicing and reinforcing oral language pattern and as a way to test a learner's use of grammatical rules (as cited in Ferris & Hedgcock, 2014, p. 74-75). The traditional rhetoric approach would typically involve having students complete controlled compositions designed to have them use specific grammatical formations and practice new vocabulary.

An offshoot of the traditional rhetoric approach is called current-traditional rhetoric. According to Berlin and Inkster (1980) this approach involved learners constructing connected discourse by combining and arranging sentences into paragraphs based on a prescriptive formula (as cited in Ferris & Hedgcock, 2014, p. 75-76). Barnett (2002) and Matsuda (2003) provide examples of common rhetorical patterns taught in the

current-rhetorical tradition including exposition, exemplification, comparison, contrast, classification, analysis, etc. (as cited in Ferris & Hedgecock, 2014, p. 75).

***Expressivism and cognitivism.*** Expressivist and cognitivist approaches gained prominence in the 1970s and 1980s and emphasized teaching students what good writers do as they write. Expressivism considers composing to be “a creative act in which process – the discovery of the true self – is as important as the product” (Berlin, 1988, p.484). Expressivist pedagogy aimed to help students develop global writing proficiency through unhindered production of meaningful text, rather than focus on reproducing structural patterns or using specific grammatical conventions (Ferris and Hedgecock, 2014). Cognitivism similarly emphasized the importance of creating and communicating personal meanings through the writing process, but it differed from expressivism in that it also included characterizations of behaviors that researchers have observed successful writers engage in: planning, formulation, and revision (Hayes and Flower, 1980).

***Disciplinary content and discursive practice.*** A number of researchers and educators argued that the expressivist and cognitivist approaches ignored the need for many L2 writers to compose texts for academic purposes with specific expectations for acceptable text (Horowitz, 1986; Ferris and Hedgecock, 2014). This led to a shift towards a pedagogical emphasis on the types of written genres that students need to produce within the context of their particular academic and career goals. Proponents of this approach promoted focusing on content, disciplinary practices, and the linguistic means of organizing knowledge, which was compatible with aspects of process approaches such as planning, drafting, revising, and peer editing (Ferris and Hedgecock, 2014).

*Socioliterate perspectives.* A variety of socioliterate approaches have emerged since the mid-1980s that share a connection to the social constructionist principle that novice writers need to be apprenticed into multiple discourse communities, such as academic disciplines, professions, and vocations (Bruffee, 1986; Hyland, 2009; Hyon, 1996). These discourse communities, also called literacies, are made up of text forms and the social practices of individuals and groups in the contexts where the texts make meaning (Gee, 2012; Janks, 2009). To participate in the literate practices of a particular group, and therefore join in their literacies, learners must learn how to produce acceptable texts. In the socioliterate approach to teaching writing and literacy, “students are constantly involved in research into texts, roles, and contexts and into the strategies that they employ in completing literacy tasks within specific situations” (Johns, 1997, p. 14-15). Ferris and Hedgecock (2014) point out that socioliterate approaches are highly compatible with content-based approaches to teaching writing, and often involve students collecting texts and assignments from relevant disciplines, analyzing their purposes, identifying audience expectations, and devising tasks and processes that teach learners the characteristic rhetorical patterns, linguistic features, and social practices around those texts. The theoretical and methodological approach to writing adopted for this project, SFL, described in the next section, is situated squarely within the socioliterate perspective.

**SFL and the genre-based approach.** The model of language proposed by Halliday and Mathiessen (2004), known as Systemic Functional Linguistics (SFL) investigates how the linguistic choices manifested in a text shape and are shaped by the

social context in which that text exists. The model is based on studies that analyze the development of L1 in early childhood in terms of the communicative functions that language fulfills as learners work to achieve various social goals such as getting needs met, making and maintaining relationships, and reflecting on experiences (Christie & Derewainka, 2008). As children age, their social needs and communicative contexts become more complex and diverse: the thinking and communication that they engage with becomes increasingly generalized and abstract; their relationships with others become more diverse; the mode of communication shifts towards written language (Christie & Derewainka, 2008). Functional linguists are interested in understanding how these contextual changes influence a student's language system.

Central to the Functional view of text is the concept of register. Register is made up of three key factors in the communicative context that impact the linguistic choices one makes: field, tenor, and mode (Derewainka & Jones, 2012). Field refers to the content or ideas that are being communicated. In the school setting, linguistic choices vary depending on the content area and topic being studied. Tenor relates to the language users, their relationship with one another, and their communicative purpose. Tenor is impacted by factors such as relative status, familiarity with interlocutors, level of expertise, age, ethnic background, and gender of participants. The mode refers to the channel through which communication is being carried out, whether it be oral, written, visual and/or multimodal. Any combination of these contextual factors creates the register of a communicative situation. As Derewainka and Jones (2012) note, the ability to identify the register of a situation allows us to predict the kind of language our student will need to use in that situation.

Perhaps the most significant distinction that can be drawn between the ways in which SLF and Schema theorists describe the kinds of knowledge that effective communicators need to have and use is the separation of linguistic knowledge into its own form of schemata in traditional schema theory, and the integration of linguistic knowledge into the three other kinds of knowledge in SLF. Both perspectives highlight the importance of knowledge of the content being discussed, through the concepts of field (SFL) and content schemata (schema theory), however, SLF theorists would argue that both content schemata and linguistic schemata are part of the field, as ideas about content are inseparable from the labels and language that we use to construct and communicate them. It may be useful to understand SLF's concept of tenor as encompassing elements of both cultural schemata and linguistic schemata, as observable linguistic characteristics are part of the cultural norms around communication between people within a given set of social relationships. Likewise, mode is the integration of formal schemata, or knowledge about the organization of written and oral text, and linguistic schemata. An example of how the three components of register are present in a classroom context will be provided after a description of concept of genre.

While the concept of register attempts to capture the key contextual variables within a specific situation that influence linguistic choices within a text, functional linguists use the concept of genre to describe the various social purposes for which we use language. According to Martin (1997), genre occurs at a broader cultural level than does register (as cited in Christie and Derewainka, 2007, p. 6). For instance, if the purpose for communicating was to tell an interlocutor about a birthday party that happened over the weekend, the genre would be a recount. If the purpose was to tell

someone how to assemble a table, the genre would be instructions. These goal-oriented social practices have evolved over time to allow us to get things done (Derewainka & Jones, 2012). Genres have characteristic structures and typically go through a number of stages, which are ordered in predictable ways, to achieve their communicative purpose. In the school context, each academic discipline has its own genres.

The model of language put forward by functional linguists, which accounts for both register and genre, allows teachers to deeply understand the interconnection between the content of a lesson, the nature of a particular task, and the language needed to complete the task. For example, imagine a history class in which students are asked to give a presentation on the causes of WWI. At the level of genre, the language choices will reflect the structures that are used to explain how several factors converge and together create an outcome. At the level of register, the field that will be developed by presenters will be related to the concepts of militarism, alliances, imperialism and nationalism, and language choices will express these dynamic processes, the ethnic and national participants involved in these processes, and the circumstances surrounding the major developments. The tenor will probably be formal, as presentations are viewed as a way to practice public speaking, and interaction with the audience is discouraged until the end. The mode will be spoken, though there may also be elements of writing and/or multimedia. Viewing a classroom task through this lens allows teachers to make informed decisions about the types of knowledge and language that they will need to explicitly teach to move students towards mastery of specific academic genres and registers. As can be seen through this example, viewing language through the SLF



perspective allows teachers to account for the discipline-specific practices that characterize teaching and literacies in the secondary context.

An instructional unit built upon the SFL perspective must aim to teach students to utilize the linguistic resources that characterize the target genre and register. Functional linguists have developed a pedagogical approach to teaching writing, called the Teaching and Learning Cycle, that attempts to achieve this goal.

**The teaching and learning cycle.** Functional Linguists put forth a pedagogical approach that they call the Teaching and Learning Cycle, which was developed specifically to help students gain mastery in the recognition and production of the predominant characteristics of academic genres and registers. The Teaching and Learning Cycle has clear connections to both the Vygotskian view of teaching that involves dialogue between a learner and a more capable peer (Vygotsky, 1978), and the concept of mentoring students into a community of practice (Lave and Wagner, 1991). The Teaching and Learning Cycle consists of four phases: building the field, modeling the genre, joint construction, and independent construction (Derewainka & Jones, 2012; Gibbons, 2007). As mentioned previously, functional linguists refer to the content or the topic being communicated as the field. Language is also part of the field, as it provides the labels for the participants, processes, and circumstances relevant to the topic. During the first stage of the Teaching and Learning Cycle, the teacher and students build their knowledge about the topic that will be communicated. They then move on to the second stage: modeling the genre. It is at this stage that both cultural schemata and linguistic schemata are developed as students analyze examples of the type of text they will be

asked to write. Derewainka and Jones (2012) advocate for leading students through a discussion of the social purpose of the text and the genre it belongs to, and arranging activities that draw their attention to the structural and grammatical characteristics of the genre and register. This stage is followed by joint construction, in which students contribute to the creation of a text or part of a text in the target genre. As the writing unfolds, the students' oral contributions are shaped by the teacher into more academic language, and the decisions that are made by a mature writer are made visible. Finally, the independent construction stage involves students independently writing a text on a related topic.

The Teaching and Learning Cycle attends to the development of students' explicit knowledge of academic registers and genres. It is the pedagogical approach to writing instruction that has been adopted for this project, and within which I will attempt to embed self-regulation strategy instruction.

This section of the literature review discussed key aspects of L2 writing development. It began by describing the challenges that ELs face as they attempt to develop literacy skills in their L2. It then described how schema theory has provided insights into what learners need to know in order to effectively write in a second language. This was followed by a description of the evolution of L2 writing pedagogy, provided as context for understanding the approach adopted to guide the development of this project. Next, it turned to a description of the model of language and pedagogical approach to teaching writing put forward by Systemic Functional Linguistics.

**Summary.** This section reviewed key aspects of L2 writing development. It began by describing the challenges that ELs face as they attempt to develop literacy skills in their L2. It then described how schema theory has provided insights into what learners need to know in order to effectively write in a second language. This was followed by a description of the evolution of L2 writing pedagogy, provided as context for understanding the approach adopted to guide the development of this project. Next, it described of the model of language put forward by SLF. Finally, it described the Teaching a Learning Cycle, a pedagogical approach to teaching genres, which is adopted in this project. The next section will describe key aspects of self-regulation and strategy instruction that are relevant to this project.

### **Self-Regulated Learning**

This section of the literature review will be dedicated to self-regulation and strategy instruction. It will begin with a brief description of self-regulation. This is followed by a discussion of two major perspectives on self-regulation strategies in the field of education generally and in the field of Second Language Acquisition (SLA) specifically. Finally, it describes Rebecca Oxford's Strategic Self-Regulation (S<sup>2</sup>R) model, which will be adopted by this author to guide the creation of curriculum that embeds self-regulation strategy instruction into genre-based writing instruction.

**Defining self-regulation.** According to Schunk and Ertmer (2000), self-regulation in learning is made up of processes such as setting goals, concentrating on instruction, using strategies to organize and rehearse information, creating a productive

work environment, using resources, monitoring performance, managing time, seeking assistance, and holding positive beliefs about one's capabilities and about learning in general (as cited in Oxford, 2011, p. 11). Zimmerman (2008) describes self-regulated learning (SRL) as the self-directive processes and self-beliefs that allow learners to transform their mental abilities into academic performance. Based on these definitions, it may be fair to say that self-regulation is a necessary but insufficient condition for effective learning, and one that becomes increasingly important as students advance through the school system and are expected to take on increasing responsibility for their learning. Oxford (2017) asserts that self-regulated learning involves action, is goal driven, and involves the use of strategies. This understanding suggests that teachers can play a role in the development of self-regulation skills by helping students set goals, explicitly teaching strategies, and providing them with opportunities to utilize those strategies by taking action to achieve the goals. In this section, we turn our attention towards understanding self-regulated learning strategies and the role they can play in helping students develop academic literacy skills.

**Theories on learning strategies in second language acquisition.** Early research on strategy instruction, led by Rubin (1975) and Stern (1975) focused primarily on identifying strategies that good language learners use as they develop language skills (as cited in Grenfel & Macaro, 2007, p. 11). As the field has progressed, language learner strategies have been researched from two distinct perspectives that have at times conflicted with one another: the psychological perspective and the sociocultural perspective.

According to Oxford and Schramm (2007), the psychological perspective, sometimes referred to as the cognitive perspective, defines an L2 learner strategy as “being a specific plan, action, behavior, step, or technique that individual learners use, with some degree of consciousness, to improve their progress in developing skills in a second or foreign language” (p. 48). The authors claim that such strategies can support the internalization, storage, retrieval, or use of new language and are tools that foster greater learner autonomy. They link internalization and storage directly to learning, while asserting that retrieval and use can support further learning, as they allow learners to discern whether their written or oral production are understandable to others, and creates opportunities to receive feedback. They note that a given strategy is only beneficial when it pertains to the task at hand, when it is employed effectively, and when it is linked to other relevant strategies. This implies that curriculum developers must choose strategies carefully to ensure their relevance to the task. It also implies that modeling effective strategy use and helping students make connections between strategies should be key features of strategy instruction.

O’Malley and Chamot (1990) made the first attempt at putting forth a clear theoretical framework for understanding strategy use and instruction from the psychological perspective. They claimed that there was a fundamental distinction among strategies: social, cognitive, and metacognitive. Social strategies included all of the ways through which we deal with affective and social aspects of language learning. Cognitive strategies were related to the actual processing of language in the brain. Metacognitive strategies were those that dealt with planning, monitoring, and evaluating those cognitive processes (Grenfel & Macaro, 2007). Borrowing from the cognitive framework

developed by cognitive psychologist John Anderson (1983), O'Malley and Chamot claimed that knowledge of Second Language (L2) strategies moves from declarative to procedural knowledge through practice. Declarative knowledge is defined by Oxford and Schramm (2007) as "conscious, fact-oriented, effortful knowledge of static, discrete data points or facts, such as definitions of words, the conventions of punctuation, or grammar rules" (p. 50). In contrast, procedural knowledge is "knowledge that is unconscious, automatic, habitual, effortless, and implicit" (p. 50). Examples of procedural knowledge include the ability to understand the meaning of a grammatical form without having to consciously think about it, or to habitually capitalize the first letter of proper nouns. Once strategies reach the procedural stage, they are no longer conscious and become fully integrated into the learner's repertoire of learning behaviors. The role of strategy instruction within the context of the psychological model is to explicitly teach a strategy, making it part of a student's declarative knowledge, and then providing practice opportunities to facilitate the internalization of that strategy into procedural knowledge.

In contrast to the psychological perspective, which views the individual learner as the fundamental unit, the sociocultural perspective emphasizes social practices and social interaction in the use and acquisition of language learner strategies. Lev Vygotsky's (1978; 1979) dialogic model does not use the term 'strategies,' but Oxford (1999) has noted that the higher order functions that he discusses are essentially cognitive and metacognitive strategies. According to McCaslin and Hickey (2001), Vygotsky's model includes four types of strategies: (a) task-involved strategies that include both cognitive and metacognitive strategies; (b) self-involved strategies that include volitional-motivational and emotion-control strategies, which are also known as affective strategies;

(c) other-involved strategies, which are also called social strategies; and (d) setting-involved strategies, which can be seen as a subcategory of metacognitive strategies.

Vygotsky understood learning as a process that takes place through dialogue with a 'more capable other,' such as a teacher, parent, or more advanced peer. As Berk and Winsler (1995) described it, the problem-solving process is verbalized in the dialogue and becomes part of the learners' thinking (as cited in Oxford and Schramm, 2007). There are three stages through which dialogues become internalized by learners: the social speech occurring in the dialogue; private or egocentric speech; and internal speech. Learning begins as being regulated by another person, but through dialogues with more capable people, becomes self-regulation (Oxford and Schramm, 2007).

A second relevant sociocultural model of self-regulation is the situated cognition in communities of practice model. Situated cognition entails learning within a given sociocultural context. A community of practice is a community centered on specific cultural practices in particular domains of life and learning (Oxford and Schramm, 2007). In this model, experienced members of a community of practice, who are knowledgeable about the characteristic cultural practices of the community, provide newcomers with access to the community. Newcomers take on the role of apprentice, observing the behaviors and practices of the experienced members (Lave and Wenger, 1991). The transfer of knowledge and skills depends in part on the willingness of the experienced members of the community to provide insider knowledge, and on the newcomer's ability to understand what they observe, ask questions, and infer how to imitate the strategies they observe (Oxford and Schramm, 2007). Sociocultural models emphasize the role of observing effective strategy use and interacting with others to acquire new strategies.

We will now turn our attention to a contemporary model for understanding self-regulation strategy use and instruction that incorporates elements of both the cognitive and sociocultural perspectives.

**The strategic self-regulation (S<sup>2</sup>R) learning model.** In part because it incorporates elements of both the psychological and sociocultural perspectives on strategy use, I have adopted Rebecca Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) model as a key theoretical framework for this project. Key components of this model are the three dimensions of strategies: cognitive, affective, and sociocultural-interactive. Cognitive strategies help the learner construct, transform, and apply L2 knowledge. Affective strategies help the learners create positive emotions and attitudes and stay motivated. Sociocultural-interactive strategies help the learner with communication, sociocultural contexts, and identity. Oxford argues that the use of strategies across these three dimensions is controlled and managed by "metastrategies." Metastrategies include metacognitive strategies metaaffective strategies, and metasociocultural-interactive strategies.

Oxford uses the term "strategic" in the S<sup>2</sup>R model to capture the fact that successful learners strategically select strategies that are appropriate for a given task at the appropriate time. Within a given task, she argues, learners will employ a variety of strategies as they pass through various phases of the task. Her model presents three task phases that high performing L2 learners pass through as they work to complete a task. The phases are:

1. Strategic forethought



2. Strategic performance (implementation/monitoring/control)
3. Strategic reflection and evaluation.

Oxford's model does not rigidly dictate which strategies learners will employ at a given task phase, but rather suggests that effective learners select strategies and metastrategies from the cognitive, affective, and sociocultural-interactive domains based on their relevance to the task at hand. The concept of task phases is useful to curriculum developers because it provides a framework for selecting appropriate strategies for instruction. For example, a curriculum developer can analyze a given instructional task and identify strategies that would help the learner prepare to engage with the task (strategic forethought), strategies that would help them complete the task (strategic performance), and strategies that would help them reflect on and evaluate their performance (strategic reflection and evaluation).

**Summary.** This section of the literature review was dedicated to self-regulation and strategy instruction. It began with a brief description of self-regulation. This was followed by a discussion of the two major perspectives on self-regulation strategies in the field of education generally and in the field of SLA specifically. Finally, it described Rebecca Oxford's S<sup>2</sup>R model, which will be adopted by this author to guide the creation of curriculum that embeds self-regulation strategy instruction into genre-based writing instruction. The next section will explain how the Teaching and Learning Cycle and the S<sup>2</sup>R Model can be merged for the create of an instructional unit that embeds self-regulation strategy instruction into a genre-based writing curriculum.

### **Merging the Teaching and Learning Cycle with the S<sup>2</sup>R Model**

This section begins with a review of the key concepts of genre, register, the Teaching and Learning Cycle, and Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) model. It then explains how this author envisions these two theoretical frameworks fitting together in an instructional unit that embeds self-regulation strategy instruction into a genre-based writing curriculum.

**Review of relevant concepts.** SFL theorists describe genre as goal-oriented social practices that have evolved over time to allow us to get things done (Derewainka & Jones, 2012). Genres have characteristic structures and typically go through a number of stages, which are ordered in predictable ways, to achieve their communicative purpose. Within each genre exists a specific register. Register is made up of three key factors in the communicative context that impact the linguistic choices one makes: field, tenor, and mode (Derewainka & Jones, 2012). Field refers to the content or ideas that are being communicated. In the school setting, linguistic choices vary depending on the content area and topic being studied. Tenor relates to the language users, their relationship with one another, and their communicative purpose. Tenor is impacted by factors such as relative status, familiarity with interlocutors, level of expertise, age, ethnic background, and gender of participants. The mode refers to the channel through which communication is being carried out, whether it be oral, written, visual and/or multimodal. Any combination of these contextual factors creates the register of a communicative situation.

The Teaching and Learning Cycle proposed by Derewainka and Jones (2012) and Gibbons (2007) uses these concepts of genre and register to provide a clear, practitioner friendly pedagogy for teaching the social purposes of text types, the content around which they are used, and their structural and linguistic characteristics. The Teaching and Learning cycle consists of four stages:

1. Building the field
2. Modeling the genre
3. Joint construction
4. Independent construction

In Oxford's (2011) S<sup>2</sup>R model there are three dimensions of strategies: cognitive, affective, and sociocultural-interactive. Cognitive strategies help the learner construct, transform, and apply L2 knowledge. Affective strategies help the learners create positive emotions and attitudes and stay motivated. Sociocultural-interactive strategies help the learner with communication, sociocultural contexts, and identity. Controlling strategy use across these three dimensions are metastrategies. Metastrategies include metacognitive strategies metaaffective strategies, and metasociocultural-interactive strategies. According to Oxford's model, there are three task phases that learners pass through: a) strategic forethought b) strategic implementation, monitoring, and control c) strategic reflection. Learners employ a variety of strategies across the three dimensions during each phase of a task.

**Merging two frameworks in practice.** We can envision how it is possible to merge the Teaching and Learning Cycle with the S<sup>2</sup>R model by breaking down each stage

of the Teaching and Learning Cycle into a series of specific tasks, and then applying Oxford's model to each individual task. For example, building the field can be achieved through a number of tasks such as reading a text, having a structured conversation, or watching a video. To ensure that they get the learning that is essential for them to be able to practice writing in the target genre, students will need to employ a variety of strategies before, during, and after the task. If the task is to watch a video to understand the causes of WWI, a student may use the metacognitive strategy of planning ahead in the strategic forethought phase, which would entail making sure they understand what they are supposed to understand and have any necessary materials (pencil, notebook, etc.) ready. If they find the video boring during the strategic implementation, monitoring, and control phase they may need to use the affective strategy of generating and maintaining extrinsic motivation by thinking about how difficult it will be to do the next task if they do not understand the material. Finally, at the strategic reflection phase, the student may use the metacognitive strategy of evaluating cognitive progress and performance to reflect on how well they understand the material after watching the video.

It is an underlying assumption of this project that strategic thinking and self-regulation such as in the example above enhance learning and, in the context of a genre-based writing unit, leads to enhanced mastery of the target genre. It is also an underlying assumption of this project that such behavior can be taught through explicit instruction and modeling of strategies.

**Summary.** This section began with a review of the key concepts of genre, register, the Teaching and Learning Cycle, and Oxford's (2011) Strategic Self-Regulation

(S<sup>2</sup>R) model. It then explained how this author envisions these two theoretical frameworks fitting together in an instructional unit that embeds self-regulation strategy instruction into a genre-based writing curriculum.

## **Summary**

The purpose of this literature review was to synthesize theory and research in the areas of second language (L2) writing for secondary learners and self-regulated learning in order to inform the development of an instructional unit that combines academic writing instruction and explicit strategy instruction. The specific research question addressed in this paper is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently?

The first section of this literature review discussed key aspects of L2 writing development. It began by describing the challenges that English Learners face as they attempt to develop literacy skills in their L2. It then described how schema theory has provided insights into what learners need to know in order to effectively write in a second language. This was followed by a description of the evolution of L2 writing pedagogy, provided as context for understanding the approach adopted to guide the development of this project. Next, it turned to a description of the model of language and pedagogical approach put forward by Systemic Functional Linguistics (SFL).

The second section of this literature review was dedicated to self-regulation and strategy instruction. It began with a brief description of self-regulation. This was followed by a discussion about the two major perspectives on self-regulation strategies in the field of education generally and in the field of Second Language Acquisition

specifically. Finally, it described Rebecca Oxford's S<sup>2</sup>R model, which has been adopted by this author to guide the creation of an instructional unit that embeds self-regulation strategy instruction into a genre-based writing curriculum.

The third section of this chapter reviewed concepts from SFL and Oxford's Strategic Self-Regulated (S<sup>2</sup>R) model of learning that are central to the creation of this project. This was followed by a description of how the SFL concepts of genre, register, and the Teaching and Learning Cycle can be merged with the S<sup>2</sup>R model to create an instructional unit that embeds self-regulation strategy instruction into a genre-based writing curriculum. The following chapter will describe the process and product of the unit created for this project.

## CHAPTER THREE: PROJECT DESCRIPTION

### Introduction

The research question addressed in this paper is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently?

The first section of this chapter will begin with a general overview of the project. This is followed by a description of the relevant methodological frameworks adopted for this project, including Wiggins and McTighe's (2005) Understanding by Design (UbD), Systemic Functional Linguistics (SLF), and Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) model, and the rationale for choosing them. It then describes the rationale for the project formant, which is followed by a description of the intended audience.

The second section of this chapter describes the project. It begins by explaining the desired results for the instructional unit and the process through which these results were identified. This is followed by a discussion of the evidence that will be accepted to measure student learning, and the development of the rubric that will be used to assess students' writing. It then describes the unit plan that was designed to move students from their current level of performance towards mastery of the chosen genre. This is followed by a description of how self-regulation strategies will be treated throughout the instructional unit. Next, it describes the summative assessment. Finally, it provides a brief description of the project completion timeline.

## **Project Overview**

The final product of this project is an instructional unit that teaches students how to write in an academic genre, persuasion, by engaging them in the four stages of the Teaching and Learning Cycle and by providing explicit strategy instruction to help students complete a variety of tasks at each stage. The project can be used by teachers to teach persuasion, or as a model to help teachers understand how they can embed explicit strategy instruction into their writing instruction.

The project includes a unit overview, a persuasive writing rubric, a summative assessment, formative assessments, and detailed lesson plans with learning targets organized around teaching key structural characteristics of the persuasive genre. For each learning target, a relevant strategy or metastrategy has been selected for each of the three task phases (strategic forethought, strategic performance, strategic evaluation and reflection). Instructions for implementing each lesson are also provided.

Brisk (2014) recommended that students be taught the structural characteristics of a genre first, and with subsequent instruction focusing on sentence-, phrase-, and word-level language features. Due to time constraints, this unit is limited to teaching the discourse-level elements of a persuasive essay. Based on Brisk's finding that students performed better when the Teaching and Learning Cycle was applied to segments of a text before being applied to a whole text, the unit was designed to move students through a full cycle for each of the three stages of a persuasive essay.

**Methodological framework.** The curriculum development framework adopted for this project is Wiggins and McTighe's (2005) Understanding by Design (UbD). It



involves a three-stage approach to planning curriculum. Stage 1 involves identifying desired results. At this stage, teachers consider their goals and relevant standards to determine what students should know and be able to do. Stage 2 involves determining acceptable evidence to be collected to determine the extent to which the learning goals have been achieved. Stage 3 is where the planner designs the learning experiences and instruction that will move students from their current ability level to the desired ability level. The project will include a unit overview using the UbD Unit Template version 2.0.

UbD was selected as the unit planning framework for this project because of the wide recognition it has received as embodying best practice. John Hattie (2009) identified UbD as an ideal approach to planning because it helps students “develop explicit cognitive schemas to thence self-regulate and teach themselves the knowledge and understanding, to realize why they need to invest deliberative practice, and then for teachers to evaluate the success of their chosen textbooks, favored lessons, methods, and activities to achieve these goals.” UbD achieves this by ensuring that all learning activities are aligned to the chosen end goal. In the case of this project, the chosen end goal is a persuasive essay.

The choice to adopt a genre-based approach born out of the Hallidayan school of linguistics known as Systemic Functional Linguistics was based on a number of reasons. First, Sally Humphrey (2017) reported on three projects that she oversaw in Australian middle schools aimed at building teachers’ understanding of language and literacy development through the functional approach. She found that students whose teachers participated in the professional development project showed significant gains on both local assessment criteria and on national testing measures. In addition, Brisk (2014), who

studied the implementation of this approach in two urban schools in Australia over a 5-year period, has provided significant guidance on how teachers can approach teaching academic genres and registers based on her research and experience working with teachers. Additional rationale for adopting the functional approach include:

- The concepts of genre and register that are part of the functional approach proposed by Derewainka and Jones (2012) attends to the content, cultural, formal, and linguistic schemata that English learners need to develop.
- The four discrete stages of the Teaching and Learning Cycle offer flexible yet concrete objectives and tasks that can be coupled with self-regulation strategies.
- The Teaching and Learning Cycle incorporates elements of multiple sociocultural learning perspective, including Vygotsky's dialogical model and the communities of practice model
- Systemic Functional Linguistics is explicitly named as one of the theoretical foundations of the WIDA Consortium's standards framework (WIDA Consortium, 2014), of which Minnesota is a member.

The theoretical framework that will guide my efforts to identify appropriate strategies to apply to the Teaching and Learning Cycle is Rebecca Oxford's S<sup>2</sup>R model. While this model is complex, it is also comprehensive. It includes strategies and metastrategies in the dimensions of cognition, affect, and sociocultural interaction. Of particular relevance to my project are the three phases (strategic forethought, strategic performance, and strategic reflection) that learners pass through as they work to complete a task. When the S<sup>2</sup>R model is applied to the teaching and learning cycle, the task phases

provide the link that establishes a clear connection between a given stage in the cycle and specific strategies and metastrategies. For each task that students complete at a given stage in the teaching and learning cycle, I will identify a relevant strategy to teach strategic forethought, strategic performance, and strategic reflection.

**Rationale for project format.** There are several reasons why I chose an instructional unit to be the product of this project. First, as stated in the first chapter of this paper, the research question chosen for this research was born out of my own struggles to effectively teach writing. From the beginning, I have viewed this project as a means through which I can develop my own skills as a teacher by learning about the knowledge and skills that students need to be effective writers and turning that knowledge into a product that benefits my own teaching practice. Creating an instructional unit requires that I apply what I have learned through a deliberate planning process. Second, the three educational concepts that I linked this research to in the introduction (equitable practice, “soft skills,” and disciplinary literacy), are all essentially related to the classroom practices of individual teachers. That is to say, it is individual teachers who do or do not provide English Language Learners with equitable access to opportunities to develop literacy skills. It is individual teachers who do or do not help students develop the strategic “soft skills” that allow them to successfully navigate school and learning. And it is individual teachers who do or do not help students understand the discipline specific ways in which language is used in their content areas. If I am to be an advocate for English Language Learners, I believe it is my responsibility to help other teachers implement these practices. This requires that I deeply understand and can model

how these goals can be achieved. The research and curriculum design process provided the understanding, and the unit itself provides the model.

**Audience.** The intended audience for this project includes ESL teachers and content area teachers at the school in which I work. My building is currently undergoing a process of identifying FOCUS standards for each grade level and each content area. This means that that departments are working collaboratively to identify essential learning targets that they want all students to meet. A subsequent phase of this work will entail incorporating disciplinary literacy into content area classes across the school. It is my hope that this unit, along with the knowledge that I gain through its development, can be tools for ensuring that ESL students in our schools get explicit literacy and strategy instruction across the curriculum.

It is also my hope that this work will benefit the ESL department at my school. As part of the FOCUS work, which I described above, our department is working collaboratively to outline the language and literacy goals for our students at various grade levels and within various proficiency levels. The genre-based approach is new to most of my colleagues within my department, and I believe having a clear example of how it can be used to support students' language and literacy development may be useful as we plan learning goals and assessments.

**Summary.** This section of the chapter began with a general overview of the project. This was followed by a description of the relevant methodological frameworks adopted for this project, including Wiggins and McTighe's (2005) Understanding by

Design (UbD), Systemic Functional Linguistics (SLF), and Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) model, and the rationale for choosing them. It then described the rationale for the project formant, which was followed by a description of the intended audience. The next section of the chapter will provide a detailed description of the project itself.

### **Project Description**

**Desired results.** The first stage in the Understanding by Design (UbD) planning process is identifying desired results. As this unit was created with the intention of being implemented in a school in Minnesota, desired results were first aligned to the Common Core State Standards for English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects (National Governors Association for Best Practices, 2010). Due to the widespread use of the persuasive genre by classroom teachers at my site, I chose to identify standards related to persuasion and argumentation. In addition, due to my project's emphasis on enhancing student self-regulation of the writing process, I chose to include a standard related to the process of planning, drafting, and revising written work. Figure 1 shows the standards used for this project.

11.7.1.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence

11.7.5.5 Use a writing process to develop and strengthen writing as needed by planning, drafting, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.

Figure 1. Standards chosen from the Core State Standards for English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects.

While the state standards provided the big picture goal for the unit, I turned to the work of Derewainka and Jones (2012) to identify the structural characteristics of the persuasive genre that would be explicitly taught in the unit to help students meet the standard. The authors identified numerous subgenres under the umbrella genre of persuasion, each with a slightly different social purpose. The subgenre of analytical exposition, with the social purpose to persuade people to a particular point of view, aligns most closely to the type of task students are asked to do at my site. Therefore, the analytical exposition was chosen as the focus of this project, and any reference to the genre of persuasion hereafter refers to the analytical exposition.

Derewainka and Jones have identified three broad stages that characterize the structure of a persuasive essay. Within each stage, there are a number of phases, which are smaller units of information that have more flexibility in terms of their location. The first stage of the persuasive genre is the statement of position, within which there are two phases: the thesis statement and the foreshadowing of arguments. The statement of position is followed by the arguments stage, in which the author presents the arguments upon which his/her position is based. Within the argument stage there are two phases: the point and the elaboration. After the argument stage comes the reinforcement of thesis stage, where the author restates his/her position and summarizes the arguments.

Using Common Core States Standards for English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects and Derewainka and Jones' description of the persuasive genre, the desired results for this project were determined to be to develop students' understanding of the stages and phases of the genre of persuasion and for them to utilize that understanding to write their own persuasive essays.

**Evidence of learning.** The second stage of the UbD process is determining what will be used as acceptable evidence of learning. In the previous section, the goal of having students write a persuasive essay that includes all of the stages and phases of the persuasive genre was identified. From this goal, it is clear that the criteria to be assessed pertain to the degree to which students successfully utilize the stages and phases of the persuasive genre in their own persuasive texts. Wiggins and McTighe (2005) propose that student performance be assessed using analytic rubrics. The advantage that analytic rubrics have over holistic rubrics is that they allow the assessor to provide feedback relative to the individual criteria being assessed, whereas holistic rubrics aggregate performance, thus leaving room for more ambiguity. This assertion is supported by Ferris and Hedgecock (2014) and Gottlieb (2016). Therefore, an analytical rubric aligned to the stages and phases of the persuasive genre was developed (Appendix A)

Having identified the criteria against which student performance would be assessed, and having created an analytic rubric to assess student performance, I turned my attention to designing the assessment task. Using the GRASPS design tool (Wiggins and McTighe, 2005), I created an authentic performance task that requires that students demonstrate their level of mastery of the stages and phases of the persuasive genre (Appendix B).

**Learning plan.** Stage three of the UbD planning process is developing the learning plan that will move students from their current ability levels towards the achievement of the unit's learning goals. An appropriate learning plan accounts for all of the assessment criteria and provides students with opportunities to practice and receive feedback on their performance relative to that criteria (Wiggins and McTighe,

2005). Therefore, the learning plan developed for this unit consists of learning experiences that build students understanding of the stages and phases of the persuasive genre, provides them with opportunities to practice producing those stages and phases, and provides them with opportunities to receive teacher feedback on their performance. The learning plan for this unit also employs the Teaching and Learning Cycle (Derewainka and Jones, 2008; Gibbons, 2009) that has been proposed by functional linguists. The teaching and learning cycle involves first building the field, or content knowledge around the topic that students will write about. This is followed by engaging students in learning activities that build their awareness of characteristics of the genre. Next comes opportunities for joint practice. Finally, students practice writing independently in the target genre.

Per the suggestion of Brisk (2014), the teaching and learning cycle has been applied to each stage of a persuasive essay as opposed to a whole text. This provides opportunities for the teacher to formatively assess and provide feedback on each stage of the text before asking students to write an entire persuasive essay. The unit consists of six lessons spread over a period of 22 “days,” plus the time it takes for students to complete the summative assessment. I have put days in quotation marks because I have allotted one day to each learning target, but it may be possible that some learning targets will require more than one class period, and others may require less.

Lesson 1 is titled Persuasive Writing Pre-Assessment, and serves a dual purpose of familiarizing students with some of the tools and strategies that will be repeated throughout the unit and provides the teacher with student writing samples that they can use to tailor instruction for students.



Lesson 2 is titled Learning About the Stages and Phases, and is designed to provide students with an understanding of what and where stages and phases occur in the genre of persuasion.

Lesson 3 is titled Writing Good Arguments and guides students through the Teaching and Learning Cycle to write strong argument paragraphs.

Lesson 4 is called Developing the Thesis Statement and guides students through the Teaching and Learning Cycle to write their own thesis statements.

Lesson 5 is called Developing the Reinforcement of Thesis and, like Lessons 4 and 5, guides students through the Teaching and Learning Cycle to write their own reinforcement of thesis.

**Application of self-regulation strategies.** The research question addressed in this paper is: how can teachers plan to embed self-regulation strategies into their writing curriculum for students who struggle to write independently? Up to this point, strategies have not been mentioned once in the description of this project. The reason for this lies in the purpose and value of strategy use. As described by Oxford (2017), strategies are “dynamic thoughts and actions, selected and used by learners with some degree of consciousness in specific contexts in order to regulate multiple aspects of themselves (such as cognitive, emotional, and social) for the purpose of (a) accomplishing language tasks; (b) improving language performances or use; and (c) enhancing long-term proficiency” (p.48). As is made clear by this definition of strategies, and by others provided elsewhere in this paper, strategies are not an end goal, but rather a tool. Oxford adds to her definition by saying, “Learners often use strategies flexibly and creatively;

combine them in various ways, such as strategy clusters or strategy chains; and orchestrate them to meet learning needs. (p.48). The dynamic and context specific nature of strategy use makes it impossible to predict which strategies will fit a given learner in a given situation.

Therefore, the approach to embedding strategy instruction into the genre-based writing curriculum that I have taken is more about exposure to, rather than mastery of, strategies. In other words, as students move through the learning plan designed to develop their ability to write in the genre of persuasion, they will explicitly engage with a variety of strategies that will help them meet the learning targets, but will not be assessed on their use of strategies. The hope is by consistently making students aware of the strategies that can be used to help them achieve tasks, they will become more aware of strategic thinking in general, and will look for opportunities to transfer the strategies used in this unit to other contexts.

Each learning target in the learning plan has been assigned three self-regulation strategies or metastrategies. One strategy is designed to prepare students to engage with the task that will allow them to meet the learning target (strategic forethought). The second strategy will be applied to the actual task that allows students to meet the learning target (strategic performance). The third strategy provides students with an opportunity to reflect on their performance or understanding (strategic reflection and evaluation). Instructions for how teachers can help students apply these strategies as they engage students with the learning tasks are provided in the lesson plans.

Strategies and metastrategies included in this unit were chosen from Oxford's (2011) list of strategies and accompanying tactics based on their applicability and relevance to each learning target.

**Summative assessment.** The summative assessment is for this unit is an opportunity for students to demonstrate their mastery of the stages and phases of the persuasive genre. It asks them to respond to a question (should the U.S. welcome more immigrants and refugees?) in essay form, using evidence and analysis. Successful completion of this assessment will require that students build their knowledge about the topic by reading a number of texts, identifying evidence from those texts that can be used as evidence to answer the question, choosing a position based on the evidence, and presenting their position and arguments in a persuasive essay. The Persuasive Writing Rubric (Appendix A) does not assess students' ability to read or identify appropriate evidence, so a teacher using these materials should be mindful of the fact that it is their responsibility ensure that students have sufficient evidence upon which to base a strong argument before they start writing.

**Timeline.** The first three chapters of this paper were written during the Spring semester of 2017. The project was created, and the fourth chapter of this paper was written, during the Fall semester of 2017. The final submission date for this project was December 15, 2017. The project was presented to my professors and peers on November 30, 2017.

**Summary.** This section of this chapter described the project. It began by explaining the desired results for the instructional unit and the process through which these results were identified. This was followed by a discussion of the evidence that will be accepted to measure student learning, and the development of the rubric that will be used to assess students' writing. It then described the unit plan that was designed to move students from their current level of performance towards mastery of the chosen genre. This was followed by a description of how self-regulation strategies are treated throughout the instructional unit. Next, it described the summative assessment. Finally, it provided a brief description of the project completion timeline. The following section summarizes Chapter 3.

## **Summary**

The research question addressed in this paper is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently?

The first section of this chapter began with a general overview of the project. This was followed by a description of the relevant methodological frameworks adopted for this project, including Wiggins and McTighe's (2005) Understanding by Design (UbD), Systemic Functional Linguistics (SLF), and Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) model, and the rationale for choosing them. It then described the rationale for the project formant, which was followed by a description of the intended audience.

The second section of this chapter described the project. It began by explaining the desired results for the instructional unit and the process through which these results were identified. This was followed by a discussion of the evidence that will be accepted to measure student learning, and the development of the rubric that will be used to assess students' writing. It then described the unit plan that was designed to move students from their current level of performance towards mastery of the chosen genre. This is followed by a description of how self-regulation strategies are treated throughout the instructional unit. Next, it described the summative assessment. Finally, it provided a brief description of the project completion timeline. The following chapter presents my conclusions.

## CHAPTER FOUR: CONCLUSIONS

### Introduction

The research question addressed in this paper is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently? This chapter will describe the conclusions that this author has made about his own learnings through the process of developing this project, about the value of this project to the profession, and about the next step the author will take on his learning journey.

This chapter begins with a section on the author's key learnings in the areas of writing instruction and strategy instruction. This is followed by a section that includes a description of implications of this project, possible future research, the means through which the results of this project will be communicated to others in the professions, and this author's view of the value that this project has for the profession.

### Key Learnings

**Writing instruction.** The first area of significant learning that I experienced through the creation of this project pertains to writing instruction. As described in the first chapter of this paper, this project was born out of a desire to be a better writing teacher. I believe this goal has been accomplished. Ferris and Hedgecock (2014) proved to be an invaluable source in helping me understand “what” to teach when teaching writing. They synthesized the work of schema theorists (Ketchum, 2006; Smith, 1988) to describe the content, cultural, organization, and linguistic knowledge that learners need in

order to master a given type of writing. This led me to an understanding of the value of the “how” to teach approach proposed by Brisk (2014), Derewainka and Jones (2012), and Gibbons (2009). These authors all advocate applying the Teaching and Learning Cycle to teaching academic genres as the pedagogical approach of choice. The Teaching and Learning Cycle consists of four stages (building the field; modeling the genre; joint construction; independent construction) that attend to all of the domains of knowledge identified by schema theorists and that teach the content, cultural, and linguistic properties of genres in a way that is in alignment with sociocultural views of learning (Vygotsky, 1978; Lave and Wagner, 1991).

An additional resource that proved invaluable for this project was Brisk (2014). Brisk provided detailed lesson plans for teaching various genres, including persuasion, which heavily informed the content and sequence of the unit’s learning plan.

**Strategy instruction.** The second area of significant learning that I experienced through the creation of this project pertains to self-regulation strategy instruction. From the beginning, this project had a dual purpose: to develop and genre-based writing curriculum and to embed within that curriculum explicit strategy instruction. I had little knowledge of what “strategy instruction” was beyond what I knew about the importance of student self-assessment. Had it not been for my discovery of Oxford’s (2011; 2017) work, this project may have gone very poorly. Oxford offered a model for understanding the language learning strategies that self-regulating learners use that pulled together multiple strands of strategy research and provided a coherent framework that I could apply to my project. Her Strategic Self-Regulation (S<sup>2</sup>R) model of learning suggests that

there are three broad categories of strategies and metastrategies that self-regulating learners use: cognitive, affective, and sociocultural-interactive. Cognitive strategies and metastrategies relate to what happens with the mind during a learning activity. Affective strategies related to what happens with emotions during a given learning activity. Sociocultural-interactive strategies related to the ways in which we strategically interact with others within a given cultural context during a learning activity. Oxford also proposed that for any given learning task, a self-regulating learner passes through three task phases: strategic forethought, strategic performance, and strategic evaluation and reflection. Finally, she provided a list of strategies across the three domains that have been identified by researchers as characteristic behaviors of successful learners.

I was able to apply the three categories of strategies and metastrategies, and the concept of task phases, directly to my project. I first took Oxford's list of strategies and metastrategies in the cognitive, affective, and sociocultural-interactive domains and re-ordered them based on their best fit to a given task phase. I then went through the learning targets from the unit's learning plan and identified a strategy or metastrategy for each task phase of each learning target. The result is that every learning target has an accompanying strategy or metastrategy for strategic forethought, strategic performance, and strategic evaluation and reflection. Tasks are approached through engagement with these strategies as a means to teach students strategic thinking and apprentice them into self-regulating behaviors.

**Summary.** This section began with a description of the author's learnings in the area of writing development. This was followed by a discussion of the author's learnings



in the area of strategy instruction. The next section of this chapter will describe the implications of this project and next steps for the author.

### **Implications and Next Steps**

**Implications of this project.** One clear implication of this project is that there is tremendous value to students of teaching and modeling strategic self-regulating behavior while we teach content and skills. This project demonstrates that, through applying Oxford's (2011) Strategic Self-Regulation (S<sup>2</sup>R) learning model, strategy instruction can be embedded into a genre-based writing curriculum in a coherent and systematic way.

An additional implication is that more resources are needed to help teachers develop understanding of and approaches to teaching discipline specific writing. While I found sufficient resources to create this project, there is a dearth of materials and ready-made resources for teachers who are not engaged in an intensive project such as master's capstone to teach academic genres or to systematically teach self-regulation strategies.

**Future similar research projects.** One area of future research involves adding to the current project an additional focus on language. Based on the recommendation of Brisk (2014), who suggested treating structure and language separately, I only created a unit that teaches the structure (stages and phases) of a persuasive essay. Grammatical and word-level characteristics of the persuasive genre were outside of the scope of this project due to time constraints. However, they are extremely important. Providing

students with additional instruction around these aspects of persuasive writing would be ideal once students understand the structure of the persuasive essay.

The project that I have developed through this research consists of one instructional unit that embeds explicit strategy instruction into the teaching of the academic genre of persuasion. Immediate projects that will utilize my learning about genre-based writing pedagogy and language learning strategies will include developing additional units that target other academic genres such as factorial explanations, procedural recounts, and narratives. These projects will involve following roughly the same plan that was followed to develop this project.

An additional area of future research related to this project will involve implementing and evaluating the effectiveness of the individual lessons contained within this project and of the unit as a whole. Based on student performance, the unit described in this project can be modified.

**Reporting results.** There will be three primary means through which I will communicate the results of this project. First, I will be presenting my project to a group of professional educators, as well as to two Hamline professors. Second, my project will be publicly available through Hamline's Digital Commons. Due to the strong emphasis on genre-based pedagogy in Hamline's ESL department, I suspect that my project may be of particular relevance to future MAESL candidates. Third, and perhaps most significantly, I will be using the knowledge I have gained and the resources I have created through the development of this project as I engage teachers at my site in deepening their understanding of disciplinary literacy and approaches to teaching

discipline-specific writing. My department is currently undergoing an alignment project in which we are identifying the long-term goals of our program and working to ensure that we are providing the necessary instruction and support for students to meet those goals. Due largely to my advocacy, we have been learning about and applying the lens provided by Systemic Functional Linguistics to this work, and have identified several genres that we believe students should master by the end of high school. In addition, I have been asked, along with several colleagues, to provide professional development for teachers in areas of language and literacy. These sessions have not yet been planned, but it is my intention to use my learning from this project as the basis for at least some of that work.

**Benefits to the profession.** Through the development of this project I have gained research skills that will help me locate and utilize resources to develop curriculum in the future. I have deepened my understanding of the Understanding by Design unit planning framework, and have practiced developing formative and summative assessments of learning. These skills will be put to immediate use in my classroom for the benefit of students.

Additionally, I have gained significant knowledge in two areas of second language teaching: writing and language learning strategies. Through my research I have become deeply familiar with the approach to writing instruction informed by Systemic Functional Linguistics, and have learned how to implement this approach in the classroom. I have also learned how to identify language learning strategies that support a given task within a genre-based writing unit. My understanding of learning strategies has

expanded from one focused on cognitive strategies to one that recognizes the importance of affective and socio-cultural aspects of language learning.

As the research for this project was taking place, I took on an informal leadership role in the ESL department at my school. All departments have been asked by our administration to create a guaranteed and viable curriculum to ensure that all students have an equal opportunity to learn. Using the knowledge that I had been building throughout the research process, I developed an alignment template, built around academic genres, that is being used to organize this work. I am currently assisting teachers in selecting appropriate genres to teach and sharing the resources that I have collected through this research. Language learning strategies have not yet been a focus in our alignment work, but I will look for opportunities to incorporate that learning in the future.

**Summary.** This section began by describing the implications of this project. This was followed by a discussion on possible related projects to be carried out by the author. Next came a description of how the results of this project will be communicated to the larger education community. Finally, this section described the benefits of this project to the profession.

## **Summary**

The research question addressed in this paper is: how can teachers embed self-regulation strategies into their writing curriculum for students who struggle to write independently? This chapter described the conclusions that this author has made about his

own learnings through the process of developing this project, about the value of this project to the profession, and about the next step the author will take on his learning journey.

This chapter began with a section on the author's key learnings in the areas of writing instruction and strategy instruction. This was followed by a section that includes a description of the implications of this project, possible future research, the means through which the results of this project will be communicated to others in the professions, and this author's view of the value that this project has for the profession.

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## Appendices

### Appendix A

#### Persuasive Writing Rubric

Stage	Criteria	Exceeds Expectations 7-8	Meets Expectations 5-6	Partially Meets Expectations 3-4	Does Not Meet Expectations 1-2	0
1. Statement of Position	b. My statement of position <i>introduces</i> my <b>position</b> on the topic I am writing about (this is also called your <b>thesis</b> or <b>claim</b> )	The reader understands the author's position, and the arguments made in the paper clearly support the author's position.	The reader understands the author's position and the arguments made in the paper mostly support that position.	The reader understands the author's position, but the arguments made in the paper do not support the position.	The reader cannot understand the author's position on the issue discussed in the paper.	Not attempted
	c. My introduction <i>foreshadows</i> the <b>arguments</b> that my <b>position</b> is based on.	The reader understands the argument that will be made in the paper and the points made in the body match the points named in the statement of position.	The reader can understand the arguments that will be made in the paper. The arguments named in the statement of position mostly match the points made in the body.	The reader identifies arguments that will be made in the paper, but does not actually make those arguments in the body.	The reader does not know what arguments will be made later in the paper.	Not attempted
2. Arguments	a. Each body paragraph has a <b>topic sentence</b> (also called the <b>point</b> ) that <b>connects</b> the <b>evidence</b> in the paragraph to my <b>position</b> .	The topic sentence clearly tells the reader what kind of argument (economic, moral, cultural, security) is made in the paragraph <i>and</i> accurately says if your argument is positive or negative.	The topic sentence clearly tells the reader what kind of argument (economic, moral, cultural, security) is made in the paragraph but does not accurately show if your arguments are positive or negative.	There is a topic sentence but it does not tell the reader what kind of argument (economic, moral, cultural, security) is made in the paragraph or does not accurately show if your arguments are positive or negative.	It is not clear that there is a topic sentence.	Not attempted
	b. <b>Evidence</b> is introduced and <b>explained</b> in each body paragraph.	Evidence is introduced that clearly supports the thesis statement. All punctuation is correct (capital letters, commas, quotation marks, periods, spacing). The evidence is clearly explained to show the reader how it supports the statement of position.	Evidence is introduced that clearly supports the thesis statement. All punctuation is mostly correct (capital letters, commas, quotation marks, periods, spacing). Evidence is clearly explained.	Evidence is introduced that clearly supports the thesis statement. There are significant punctuation errors (capital letters, commas, quotation marks, periods, spacing). Evidence is explained but it is unclear how the evidence supports the statement of position.	Evidence is introduced but it does not clearly support the thesis statement.	Not attempted
	c. Each body paragraph <b>connects</b> your <b>argument</b> to your <b>position</b> .	The author clearly connects the main point of the argument to the statement of position.	The author connects the point of the argument to the statement of position.	The author tries to connect the point of the argument to the statement of position but it is unclear.	Reader cannot understand the connection between the argument and the statement of position.	Not attempted
3. Reinforcement of Thesis/Position	a. My conclusion <i>restates</i> the <b>position</b> that I identified in the introduction using different words.	The reader understands the author's position, it is the same as the position stated in the statement of position but worded differently.	The reader understands the author's position and it is the same as the position stated in the statement of position.	The reader understands the author's position, but it is different that the position stated in the statement of position.	The reader does not understand the author's position.	Not attempted

## Appendix B

## **Persuasive Essay: Should the U.S. Welcome More Immigrants and Refugees?**

**Goal:**

Your goal is to write an analytical exposition on the topic of immigration and refugee resettlement to the U.S. You are responding to the following question: Should the U.S. welcome more immigrants and refugees?

**Role:**

You are a member of the immigrant or refugee community in Minneapolis.

**Audience:**

Your audience is the general public. You want people to understand your position on this topic as an immigrant or refugee. You hope that helping other people understand your position and the reasons behind it will make them support politicians who share your views.

**Situation:**

You are being asked to develop a persuasive essay on a topic that connects to your life and to events that are happening in U.S. politics right now.

**Product, Performance, Purpose:**

To complete this assignment, you need to collect evidence about the costs and benefits of accepting more immigrants and refugees for the U.S. You will then choose a position, and use your understanding of the stages and phases of an analytical exposition to write your persuasive essay.

**Standards and Criteria for Success:**

Your essay needs to include:

- All stages and phases of an analytical exposition
- A solid position that is supported by the evidence you use
- Arguments that follow the TIQA format

### **Common Core State Standards for English Language Arts and Literacy in History/Social Studies, Science, and Technical Subjects:**

11.7.1.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence

11.7.5.5 Use a writing process to develop and strengthen writing as needed by planning, drafting, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience