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## Cultivating the Strategy of Summarizing Sequential Expository Text: Scaffolds and Supports for the Intermediate Grades

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Summarizing expository text is a sophisticated strategy that requires multiple thinking and reading processes to operate in tandem as a student processes information. To summarize well, it is critical that the reader decodes efficiently and effectively. However, accurate decoding is just the starting point. A skilled reader must analyze the text during and after reading, determining details and events that are central to understanding. As text length and complexity increase in the intermediate grades, so do the cognitive demands on the reader (Duke & Pearson, 2009; Liebfreund & Conradi, 2016; Pečjak, & Pirc 2018). With longer text selections, a reader must sort and categorize further, determining multiple main ideas and threading them together to make sense of the central theme or message.

The Common Core State Standards (CCSS) for English Language Arts, released in 2010, emphasize that attention to expository text should increase during the K-12 school years (Calkins, et al., 2012; Schugar & Dreher, 2017). According to the standards, half of what students read in fourth grade should be informational in structure, rising to 55% by 8<sup>th</sup> grade and 70% by 12<sup>th</sup> grade (National Assessment Governing Board, 2009). The College and Career Anchor Standards state that students must learn to read closely to determine the meaning of the text, analyze the development of events or ideas, and summarize supporting details and ideas (National Governor's Association, 2010). The importance of grounding comprehension in the text, as opposed to an emphasis on personal connections, is highlighted to reflect the expectations and demands of college and the workforce (Calkins, et al., 2012; Heiser, 2014).

Despite the increased attention to standards-based instruction, the United States continues to lag internationally on the Programme for International Student Assessment (PISA), ranking 38<sup>th</sup> in the world behind many industrialized nations in 2018 (DeSilver, 2017). Interestingly, U.S. students performed better on narrative text comprehension than expository text comprehension on

the 2015 PISA; this finding was not consistent with many high-ranking nations' results (Shugar & Dreher, 2017). Furthermore, the results of the 2019 National Assessment of Educational Progress (NAEP) indicate that the majority of fourth- and eighth-graders in the U.S. are not proficient readers (The Nation's Report Card, 2019). Dismal results on NAEP are not new or surprising. The trend since 1992 has been stagnant, leading national education experts to describe the 2019 scores in reading as "dismaying," "bleak," and "worrisome" (Chingos et al., 2019). The continued poor achievement of the lowest-performing students is of particular concern. Despite great gains in the early 2000s, this group of students has been steadily spiraling downward over the past decade.

The macro view of educational achievement can be overwhelming and discouraging. However, school leaders and teachers typically exercise a micro view. It is their job to drill down and analyze student data at the district, school, classroom, and individual level to create a plan of action. The goal of this two-phase action research study was to improve 4<sup>th</sup> grade students' ability to summarize expository text in writing. The original project emerged from the collaboration between a school instructional coach and a 4<sup>th</sup> grade teacher of language arts. After coteaching together for two years and iteratively analyzing data, we developed a unit plan to address the distinct needs of our students who were underperforming on various measures of comprehension. A series of explicit, scaffolded lessons focused on improving students' ability to demonstrate comprehension of sequential text through written summaries.

The study expanded the following year when the instructional coach moved to another state and became a district literacy coach. The achievement trends in the new district mirrored those of the original site. We revisited and revised the unit plan; six additional teachers volunteered to carry out the lessons. The following research question guided the study: To what extent will three

specific instructional strategies (i.e., cloze summaries, graphic organizers, and Jot Dots for paraphrasing) affect students' ability to demonstrate understanding of expository text in writing?

### **Review of the Literature**

Summarization requires readers to actively process text and “build hierarchies of knowledge on a firm basis of accurate text representation” (Guthrie & Klauda, 2014, p. 395). One of the primary benefits of emphasizing instruction on summarization is its dual function: the act of summarizing deepens the comprehension of the reader while providing formative data for the teacher about the student's depth of the understanding (Pečjak, & Pirc 2018). As intermediate readers transition to “reading to learn” (Chall, 1983), summarizing in writing can become an effective tool for building comprehension of expository text. Shanahan (2019) emphasizes the multiple intertwined processes involved in summarization, stating that “to summarize effectively, students need to recognize main ideas, key details, disregard unimportant or repetitive ideas, construct topic sentences, paraphrase, and collapse or combine lists or events into general statements” (p. 320).

### **Reciprocity: An Argument for Summarizing in Writing**

There is widespread consensus that reading and writing are reciprocal processes that should be intertwined throughout the school day (International Literacy Association, 2020; Moats & Tolman, 2019; Shanahan, 2019). Encouraging and empowering students to read closely and write intentionally about their reading reinforces and extends learning. When students take on the role of author, they deepen their understanding of choices that a writer makes. Similarly, when students read and analyze different genres and text structures, they gain insight that can be applied to their own writing. Though writing often receives less time in the daily schedule in elementary schools

across the nation, it is crucial that it receive equal emphasis, for the sake of growth in reading as well in writing (International Literacy Association, 2020).

Writing summaries in one's own words is a particularly constructive undertaking as it enhances and solidifies the reader's depth of comprehension (Graham & Hebert, 2011; Shanahan et al., 2010). Fisher, Frey, and Hattie (2016) found significant benefits in this instructional task, stating that students who regularly summarize in writing "engage in an immediate review process that allows them to notice their own level of understanding, and receive timely and actionable feedback" (p. 57). The subskills of summarizing (e.g., main idea and detail identification, paraphrasing, signal word recognition, etc.) promote strong reading comprehension and skilled writing.

### ***Complementary Standards for Reading and Writing Address Summarization***

To prepare for academic and work life, the anchor standards for writing state that students should learn to analyze topics, texts, and content as well as gather and integrate information while avoiding plagiarism. The Common Core specifically addresses three types of response writing: summarizing texts, analyzing texts and ideas in texts, and synthesizing information across texts. They all have high face validity for college and career readiness (Shanahan, 2015) and fall along a continuum of development.

The standards for writing include a specific focus on summarization, complementing the reading standards' implicit and explicit references to this strategy. Summarization is indirectly referred to as early as first grade (e.g., RI.1.2: Identify the main topic and retell key details of a text) and receives distinct mention in fourth grade standard RI.4.2 and fifth grade writing standard W.5.8 (National Governor's Association, 2010). The research community and CCSS concur;

summarization is a strategy that should be woven throughout reading and writing instruction in the elementary years.

### **Increased Demands and Expectations in the Intermediate Years**

Historically, primary grade teachers emphasize narrative over informational text during read alouds and shared reading. Frequent participation in narrative story telling likely contributes to young students' relative ease with narrative retelling as compared to expository (Qin, et al., 2019). The sequential nature and familiar format of narrative text, as well as the less demanding discourse style, enhance students' ability to reconstruct the story in their own words (Baker et al., 2020; Parenti, 2018). Less emphasis is placed on retelling of expository text in early childhood classrooms. Reutzler et al. (2016) found that the majority of primary grade teachers' lack the ability to identify informational text structure, thus compounding the lack of exposure to high-quality expository text and instruction for students in the early years.

In the middle grades, reading to learn requires a shift in cognitive processing (Chall, 1983; Qin, et al., 2019). Not only are reading pieces longer and more difficult to decode in the intermediate years, the author's purpose may be more challenging to discern. The content-specific vocabulary often hinders comprehension, particularly when students lack decoding or morphological skills (Moats & Tolman, 2019). Another consideration is the necessity to apply background knowledge to achieve deep understanding of the text (Anderson & Pearson 1984; Hattan, et al., 2015). These challenges, among others, contribute to what Chall (1983) called a "fourth-grade slump." This slump is more pronounced in low-income students, particularly if they have not had access to rich curriculum and skilled instruction (Schugar & Dreher, 2017). Recent analyses of the NAEP results for reading confirm that the phenomenon of the fourth-grade slump

persists decades after Chall coined the phrase (Chingos et al., 2019; The Nation's Report Card, 2000; Schugar & Dreher, 2017).

Strategic lessons are necessary to address skills for comprehending expository text and the complex needs of learners (Barr, et al., 2019; Shanahan, 2019; Ward-Lonergan, & Duthie, 2016). In an experimental study on summarizing with 4<sup>th</sup> graders, Pečjak, & Pirc (2018) found that students struggled to write in their own words despite explicit instruction on a particular strategy for summarizing. The tendency to revert to a copy-delete approach modeled early in the intervention phase lingered. Copying from the text is a natural inclination for students in the intermediate years for whom plagiarizing is a new and unfamiliar topic. Due to the difficulty of citing in academic writing, many intermediate-level writers often plagiarize without intentionality (Shanahan, 2019).

### **Purposeful Scaffolds to Support Summarization**

#### *Cloze Summaries Provide Structure for Beginning Summarizers*

Instructional scaffolds are temporary supports provided by teachers as students learn new skills and strategies (Archer & Hughes 2010). The cloze procedure has a long history in English as a second language pedagogy as well as reading assessment and comprehension instruction (Geller, 2013; Oller & Conrad, 1971; Propst & Baldauf, 1979; Schneyer, 1965). Students demonstrate understanding by filling in blanks where words or phrases have been purposefully omitted. Cloze reading can be standalone passages that students complete with a word bank. Teachers can also create their own cloze passages based on texts that students read.

Cloze summaries enable students to understand the expectations for concise paragraph summaries that include topic sentences and supporting details (Roehling, et al., 2017; Stevens et al., 2019). Students read the text closely in order to fill in the blanks, but the cognitive load of

independently producing the written summary is reduced. The cloze approach is particularly effective with English learners (ELs) and those who struggle with reading and writing due to the demands of discourse, vocabulary and background knowledge. Thoughtfully created word gaps allow readers to select terms from a word bank, making the process more accessible to ELs and others in need of scaffolds (Lee & Schallert, 2016; Shanahan, 2019; Wijekumar, et al., 2018). See Appendix D for an example of one of the cloze summary passages used in this project.

The cloze procedure presents an opportunity to practice the skill of main idea identification. By providing exemplars of main idea statements, teachers build understanding of succinct topic sentences in summaries. The cloze paragraph presents a model to students, familiarizing them with the structure and discourse of this type of writing (Graham & Perin, 2007). As students develop understanding of the flow of an expository paragraph summary, the teacher can segue into a less-explicit approach for summarizing such as the use of graphic organizers.

### ***Graphic Organizers Support the Gathering of Relevant Information***

Graphic organizers help students organize and cluster information in a meaningful way as they read and write (Dougherty Stahl, 2016; Marzano, 2010). Intentional pairing of the graphic organizer with the informational text structure of the book, article or passage, enhances students' capacity to make meaning from text (Clark, et al., 2012; Roehling, et al., 2017). For example, Venn diagrams for compare-contrast text and concept maps for description act as scaffolds for young readers who need a mental framework to support comprehension. Fishbone maps for problem and solution and cause and effect diagrams use arrows to clarify relationships between events and/or phenomena. Flowcharts or linear strings emphasize the chronological flow of sequential text and help students break the story or passage into steps or events. In this project, we utilized graphic



organizers suited to sequential text, such as timelines and charts for main idea and supporting details (see Appendix E).

Teachers can use graphic organizers to demonstrate how proficient readers organize their thoughts during and after reading. Initially the teacher provides significant support by modeling how to complete a graphic organizer such as a timeline. Through direct teaching and strategies such as think aloud, the teacher takes on most of the responsibility for reflecting and writing. As students grasp the process, the teacher diminishes the level of support and gradually shifts responsibility to the students (Chang, et al., 2002; Roehling, et al., 2017). Students continue to use familiar graphic organizers as they read, but are now empowered to complete them collaboratively or independently.

Well-selected, completed graphic organizers serve as a map for the writing of expository summaries. With the important information extracted and recorded in an organized way, teachers guide students to apply notes from the graphic organizer to a written summary. Again, this process requires modeling and demonstration. Students observe how a proficient reader uses the information in the graphic organizer to build a concise summary. One of the most challenging aspects for intermediate grade students is expressing notes and quotes from the text in one's own words, also known as paraphrasing (Shanahan, 2019; Stevens et al., 2019).

### ***Paraphrasing Instruction Builds Capacity for Summarizing***

Paraphrasing is a micro-based approach that requires the reader to stop, think, and reflect on the information provided across several sentences in a text (Brown & Day, 1983). It is a sophisticated and essential aspect of summarizing that challenges readers and writers of all ages. The reader applies background knowledge and comprehension strategies to not only extract meaning, but also to integrate and manipulate the author's ideas in their own words. Explicit

instruction in paraphrasing improves struggling readers' ability to identify main ideas and comprehend informational text (Stevens et al., 2020).

Building discipline around the skill of paraphrasing requires instruction that apprentices students gradually and deliberately (Shanahan, 2019). The ability to make notes in one's own words is particularly complex and difficult for students who lack language proficiency or have developmental delays or reading disabilities (Hebert, 2019). Annotating in the margin, making bulleted lists in learning logs, and recording notes in graphic organizers are techniques for paraphrasing content. Learning to jot notes is a critical tool for developing readers and researchers; teachers play an important role in modeling and teaching this skill frequently in the intermediate grades.

The technique for paraphrasing utilized in this study is called Jot Dots (Greiner, 2018). Jot Dots involve "The Rule of 5" in which students are guided to jot notes in a chart or bulleted list, limiting each note to five words or less. Depending on the length of the story or passage, the number of notes is restricted as well. When concise and sufficiently comprehensive notes are collected, the writer concludes with "Do it, verb it, big picture." This important step guides the student to create a topic sentence that captures the main idea of the notes. The writer then uses the topic sentence to begin a summary paragraph, followed by sentences crafted from the Jot Dots. The jotting strategy can be transferred to annotations and graphic organizers. It is a developmental approach to paraphrasing for young writers. See Appendix F for the Jot Dots frame used in this study.

### **Method**

Our action research project evolved through a collaboration between the researcher, an instructional coach at the time, and a 4<sup>th</sup> grade teacher. Our goal was to improve students' ability

to summarize expository text in writing. Due to the students' lack of substantive experience with summarizing and the disproportionate number of readers who were below grade level, we began with sequential text structure. We felt that the linear nature of sequential text would make the content accessible as the students' learned the skills of note taking and paraphrasing (Arfé et al., 2018).

### **Phase 1 Participants and Setting**

The teacher that participated in the first year of the project had been teaching for 10 years, nine of those spent in fourth grade at the study site. She had a Master's degree in reading and writing. Two classrooms were part of our project; students changed classrooms daily to receive math instruction from her fourth-grade teaching partner and English Language Arts (ELA) instruction from the teacher participant. The author of this study was the school instructional coach (IC) and frequently cotaught with the ELA teacher. As literacy specialists, we had a common interest in evidence-based literacy methods and spent several weeks reflecting and researching strategies to meet the needs of our students.

The school was located in a working-class neighborhood in a small town (population 16,500) in a southeastern state. More than 85% of the students at the site qualified for free and reduced lunch prices, making it eligible for schoolwide Title 1 funding. The student population was small and diverse. There were 285 students at the school with two homeroom classes at each grade level. Students in both fourth-grade classrooms took part in the study (N=46) with 40% identifying as White, 28% as African American, 11% as Hispanic, and 21% as two or more races. The school was labeled "in need of targeted support and improvement" due to unsatisfactory growth by African American students on the state reading and math assessment. More than half of the fourth-graders in the study scored below the proficient level on the 3<sup>rd</sup> grade state reading

test the previous spring. The fall reading benchmark reflected that trend with slightly more than half of the students below the norm on the NWEA Measures of Academic Progress for reading.

### **Phase 2 Participants and Setting**

The teacher from Phase 1 (Teacher A) continued in Phase 2 and was joined by six teachers with varied levels of experience. See Table 1 for specific information regarding teachers' total years of experience, years of experience in fourth grade, and graduate degree status. All teachers in Phase 2 taught self-contained homeroom classes, working with the same group of students all day. Teacher A had a full-time special education collaboration teacher in the classroom; the new teachers to the project did not work at schools with a coteaching model. The six new teachers to the study were members of the researcher's cohort on professional growth and development on the science of teaching reading, a grant-funded state initiative.

**Table 1**

*Teachers' Experience and Graduate Education Levels*

	Total Years of Experience	Years of Experience in 4 <sup>th</sup> Grade	Graduate Education
Teacher A	10	9	Master's Degree-Reading/Writing
Teacher B	9	8	None
Teacher C	2	1	None
Teacher D	13	4	Master's Degree-Early Childhood
Teacher E	11	10	Master's Degree-School Leadership
Teacher F	7	6	None
Teacher G	5	3	None

The three schools that participated in the study received federal Title I funding due to the number of students that qualified for free and reduced lunch prices. The new study sites, schools B and C, were located in a small school district outside a large urban area (population 2,550,960 in 2019) in a southern state. Overall, 82% of students in the district were considered economically disadvantaged. Student population was not very diverse; the community was predominantly Hispanic. Both schools had received the lowest rating by the state agency for the 2018-2019 school year for unacceptable performance on the state reading and math assessment. Of the 41 fourth-graders at School B who participated in the summarizing project, 60% were below grade level per the Fountas & Pinnell Benchmark Assessment System (BAS) in August of that school year. School C had 44 participating students; 55% were rated below level on the BAS just weeks before the project began.

The participating teacher from Phase 1 was still teaching for the same district in a southeastern state. However, the district elementary schools had reconfigured into one K-1 and one 2-5 site. Thus, the population and demographics changed in the second year of the study. School A was slightly less diverse than the site of the original study. The teacher had 23 students; 13 scored below the 50<sup>th</sup> percentile on the NWEA Measures of Academic Progress fall benchmark. See Table 2 for information regarding the demographic composition of the schools.

**Table 2**

*Student Demographics by Study Site*

	School A	School B	School C
Total School Population	1,114 students (grades 2-5)	566 students (grades 1-5)	472 students (grades 1-5)
Number of Participating Students	23	41	44

Economically Disadvantaged	69%	88%	91%
English Learners	7%	15%	27%
Special Education	13%	12%	10%
African American	15.5%	4%	1%
Hispanic	13.5%	93.5%	90.5%
White	59%	2%	8%
Two or More Races	12%	0.5%	0.5%

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## Measure

A pre- and post-assessment was administered to measure growth in students' ability to summarize expository text in writing. Teachers instructed students to listen closely to an expository text with sequential text structure. They were informed that there would be a short task at the end. The story selected for the beginning of the unit was *Humphrey the Lost Whale: A True Story* by Richard A.S. Hall and Wendy Tokuda. The story read for the post-assessment was *The Story of the Statue of Liberty* by Betsy Maestro. We decided to read the stories aloud so that access to the texts was equitable. After the read-aloud, the teacher gave these directions: *Write a summary of the story you just heard.* Though students had questions, the only clarification provided was *Tell about the story in your own words.* Students received a clean sheet of writing paper and 15 minutes to write. This same procedure was followed for the post-test. The participant researcher scored the summaries with a rubric for summarizing expository text (Appendix A).

## **Materials**

In Phase 1, we used a wide variety of materials, i.e., trade books, e-books, leveled science readers, and videos. The school had relatively rich resources, which included a book room with collections of informational books, an extensive classroom library, and disciplinary book sets. Schools B and C that joined the project the following year lacked literacy resources. Therefore, more e-books were used than trade books in Phase 2 to make the lesson delivery consistent across schools. This was an unfortunate, but necessary, adaptation.

Technology was incorporated throughout the unit. Students used Chromebooks to listen to audio-read alongs and access e-books. iPads were used to create shared summaries of books with an interactive whiteboard app called ShowMe during Phase 1. Teacher involvement was necessary for learning to use the app. Unfortunately, Schools B and C lacked co-teachers and student devices, leading us to eliminate the use of ShowMe in the Phase 2 unit plan.

## **Procedures**

Teacher A and the IC collaborated to design a unit of instruction (Appendix B). The lessons were delivered in a variety of formats, i.e., whole group instruction, small group instruction, learning stations, and partner reading. Various scaffolds were incorporated to support the two groups that included several English Learners (ELs), students with learning disabilities, and students in reading intervention groups. As the unit progressed, we frequently met to analyze student work, reflect, and modify upcoming lessons.

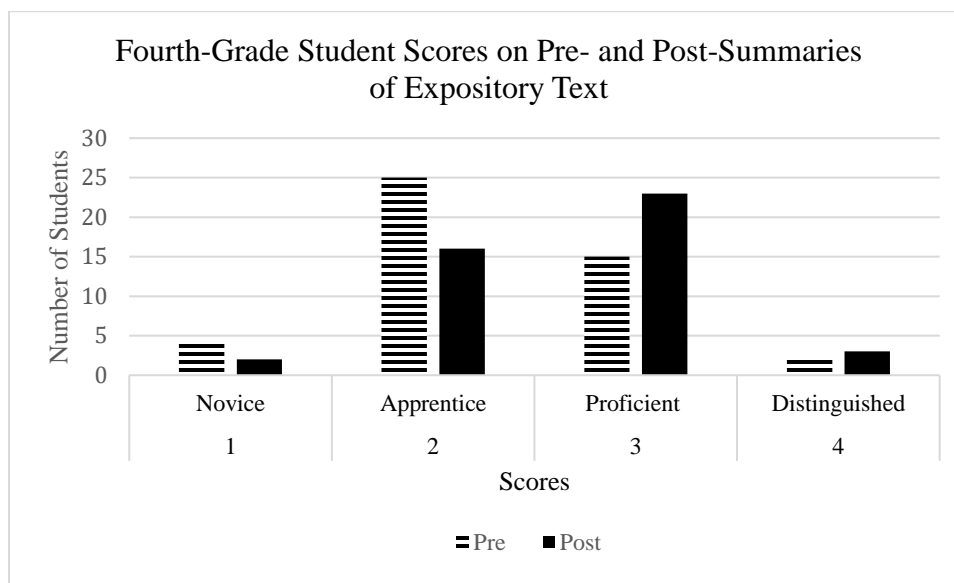
The data gathered from assessments (see Figure 1) as well as classroom observations in Phase 1 informed the modification of the unit for Phase 2 the following year. The principal strategies from the first year of the study, i.e., cloze summaries, graphic organizers, and Jot Dots were continued in the second phase. However, adaptive lesson planning and coteaching were not

possible due to the increase in teacher participants from one to seven. The lesson plans for Phase 2 were modified to be more explicit, including a semi-scripted, detailed sequence of steps. The participant researcher met with all teachers to give an overview of the instructional unit and review materials (see Appendix C). The participant researcher was available to answer questions from participants during the month of instruction, but in general, the classroom teachers carried out the unit independently in their own settings.

### **Results**

We hypothesized that intentional, scaffolded lessons on summarizing informational text would improve students' ability to summarize nonfiction stories with sequential text structure. Each student's pre- and post-summary was scored using the 4-point rubric found in Appendix A. Collective growth for the Phase 1 group of students was analyzed by comparing the number of scores at each level (1-4) on the pre- and post-assessments. Figure 1 illustrates that the number of students performing at the proficiency level increased from pre- to post-test. Prior to the instructional unit, 17 out of the 46 students scored at level three or four. Upon completion of the lessons, 26 students reached proficiency and above. Though this was a modest gain, we felt that it indicated that explicit instruction on summarizing had a positive effect. We decided to extend the strategies and skills from the unit into other lessons on expository text to foster continued growth. In addition, we resolved to revise the unit and implement it again the following year.



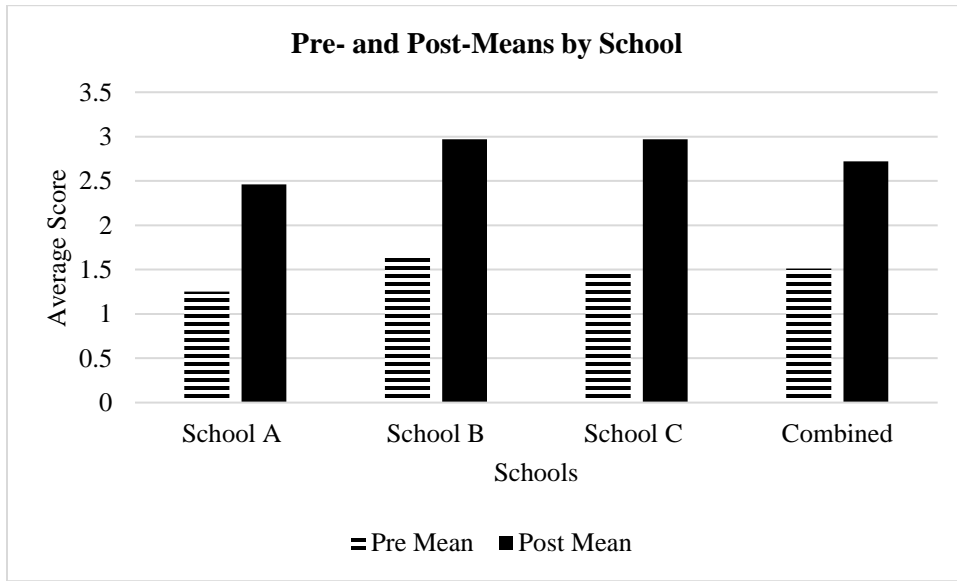
**Figure 1***Phase 1: Pre- and Post-Assessment Scores*

In Phase 2, due to the expansion of the project and the intent to produce research, we tested our hypothesis with paired t-tests to measure growth from the pre- to post- assessment. Paired, or correlated, t-tests are statistical measures that can be used to determine if there are significant differences in pre- and post-test means. For this study, all statistical significance was set at  $p < .01$ .

There was a significant difference in students' ( $N=101$ ) scores for the pre-test ( $M=1.51$ ,  $SD=.633$ ) and the post-test ( $M=2.72$ ,  $SD=.829$ ). The pre-and post-test scores were analyzed by school (Figure 2) and by classroom (Figure 2). The greatest difference in means was evident in Teacher F's students; the class mean increased by 1.65 points from pre- to post-assessment. The only group of students (Teacher D) that did not exhibit statistically significant growth had a difference of means of 0.5. With six out of seven classrooms experiencing statistically significant growth, these results suggest that explicit instruction on strategies for summarizing in writing influenced students' ability to summarize in writing.

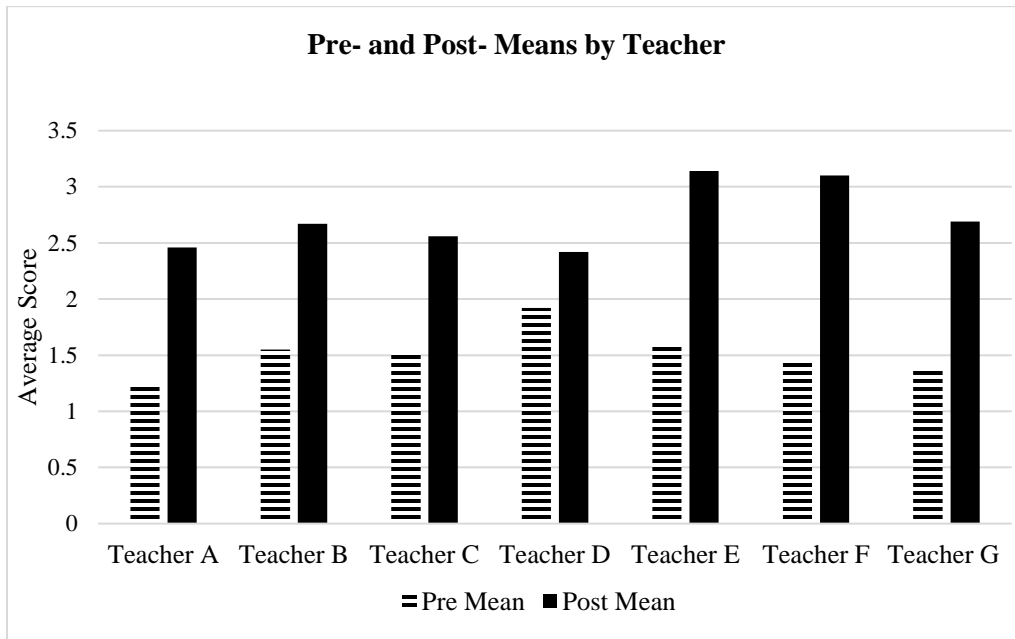
**Figure 2**

*Phase 2: Pre- and Post-Test Means by School Site*



**Figure 3**

*Phase 2: Pre- and Post-Test Means by Teacher*



Student writing samples demonstrated that students had developed understanding of expectations for summarizing in writing. On the pretest, many students were unsure of how to

organize their thoughts. Many writing samples were brief or disorganized. On the post-test, however, most students produced structured paragraphs that included a topic sentence and moderate use of transitional phrases (see Appendix G for student writing samples). Anecdotal analysis of the samples demonstrated that students needed more instruction on the proper use of transitional phrases and the incorporation of academic vocabulary. I met with teachers to review the data and plan next steps. One teacher commented on the rigor of the unit and was excited to see her students transferring many of the strategies and skills to other lessons and subjects. Another teacher assured me, “We are going to be summarizing all year long!”

### **Discussion**

Writing to learn and to demonstrate learning is critical for college and career readiness. The CCSS specify what students must be able to do in each grade, e.g., “identify the main idea” or “summarize,” but do not provide a roadmap for how to get there (Calkins, et al., 2012; Shanahan, 2015). Direct instruction in Tier I and II settings must support students’ developing understanding of multiple subskills that contribute to the strategy of summarizing. As text length and complexity increase, scaffolded instruction on paraphrasing, note-taking, and summarizing helps students avoid the phenomenon known as “hitting the wall of the 4<sup>th</sup> grade” (Meltzer, 2007).

State and national assessments of fourth-grade students illustrate the unfortunate and persistent “fourth-grade slump in comprehension” (Chall & Jacobs, 2003; Chingos et al., 2019; The Nation’s Report Card, 2000; Schugar & Dreher, 2017). Since 2002 and the enactment of the No Child Left Behind Act, very little progress has been made in terms of closing the achievement gap between low- and high-income students in fourth-grade. Decades of stagnation in reading is a call to action. Teachers, such as the participants in this action research study, can become change

agents by using relevant data to guide them toward strategic, evidence-based practices for expository reading.

Assessing reading comprehension is a complicated matter. Decoding, fluency, background knowledge, vocabulary, morphological skills and more play a role in students' ability to make sense of text. This intricate mosaic of cognitive processes makes the analysis of students' struggles difficult (Liebfreund, & Conradi, 2016 Shanahan, 2019). Traditional reading assessments, such as multiple choice, do not provide the kind of useful data that teachers need. In this study, the practice of writing expository summaries was constructive and beneficial for teachers *and* students. For teachers, the summaries provided a window into students' understanding of the text as well as formative data about students' strengths and weaknesses with subskills such as paraphrasing, sentence construction, the use of transitional words, etc. For students, the act of writing was a means to metacognitively process the text and improve comprehension along the way.

Research has shown that applying cognitive and metacognitive strategies to writing improves learning outcomes in reading (Klein, et al., 2018; Shanahan, 2019). The findings presented here corroborate the literature, demonstrating that the reciprocal nature of reading and writing was "exploited" to good effect. In the three schools in this study, the allocation of time for reading and writing was not balanced in the master schedule. However, the teachers in the study recognized and celebrated the interwoven literacy skills in this unit and felt that the post-summary demonstrated improved reading comprehension *and* written expression for their students. The time spent writing during the reading block was a worthy investment for overall literacy development.

Third-grade state assessments and district benchmark tests indicated significant underachievement patterns for the student groups in this study. The pretest further demonstrated the lack of ability to comprehend and summarize grade-level expository text. Focusing on three

specific, evidence-based strategies for summarizing provided the structure and foundation students needed to improve their ability to summarize in writing. The strategies were gradually released to students with teacher modeling, guided practice, collaborative learning, and independent work. The gradual release of responsibility framework (Pearson & Gallagher, 1983) was instrumental in equipping students with the tools that they needed to tackle a very complex task.

Teachers addressed component skills of summarizing through mini-lessons during the unit. Some of the mini-lessons were explicitly included in the master plan. For example, supports for academic language use (specifically vocabulary and transitional phrases) were provided through word banks, visuals, and anchor charts that teachers and students frequently used. Other mini-lessons occurred spontaneously. As responsive teachers, the participants shared that they provided additional learning experiences at times. In a post-interview about the unit, one teacher described the engaging, supplemental videos she found on transitional phrases to support students whose use of transitional words was awkward or inaccurate. As the literacy coach, I observed one of the participating teachers referring to Jot Dots while working with a small group on annotating text. She expertly guided the students to remember learning about Jot Dots and the “Rule of 5” (Greiner, 2018) while making notes in the margin. Attunement to student needs and commitment to the learning goals of the unit were critical to the success of our project.

### **Considerations of Accessibility**

A critical consideration in this project was how to build a bridge for our readers and writers, particularly those with language barriers or learning disabilities. Access to grade-level text had to be addressed; many of the students were not able to efficiently decode grade-level material. To maneuver this barrier, we implemented supports throughout the unit, e.g., teacher read-alouds or audio read-alongs, videos, and partner reading. We were committed to helping students meet

the “challenge of challenging text” (Shanahan, et al., 2016). Since our principal goal was to improve summarizing in writing, we scaffolded the decoding process to meet students at their point of need.

### **Limitations of the Study**

The researcher was fortunate to find seven teachers willing to participate in this action research project despite the array of demands on their instructional schedules. The original teacher participant in Phase 1 was highly involved in the evolution of the project. As her instructional coach, we were able to devote significant time to planning and coteaching of the unit. Teachers who joined during Phase 2 had limited time for planning and training due to other district initiatives. Though each teacher received a brief overview of the unit, deep discussion and training on the specific strategies was not possible. Instead, teachers completed self-study in preparation for the unit.

As mentioned previously, coteaching made an impact in Phase 1 but was not manageable in Phase 2 due to staffing issues. If this study were to be replicated, data should be gathered throughout the unit via field observations on the implementation of the unit and instructional moves made by the diverse teachers. All teachers stated in an informal post-survey that they taught “most” of the lessons to fidelity. It would be important to know what elements were left out and even more important to know what was added.

Another limitation involved the grading of the pre- and post-summaries and the need for interrater reliability and scoring. If the study is replicated, each teacher should score his/her own writing samples and interrater scoring should be employed as well. Teachers gain knowledge and insight by assessing their students with rubrics just as students benefit from self-assessment with rubrics.

## **Implications and Recommendations**

### **Increase Attention to Expository Text in the Primary Years**

The research community has called for increased attention to expository text in the primary years since the adoption of the common core (Calkins, et al., 2012; Dreher & Kletzien, 2017; International Literacy Association, 2018; McClure & Fullerton, 2017; Shanahan, 2015) Teacher read-alouds are an effective tool for engaging young students with this genre (Baker et al., 2020). Simply setting aside time to read aloud is not enough for “Not all read-alouds are not created equal” (International Literacy Association, 2018). Intentional, strategic use of read-alouds requires deliberate effort to balance genre and structure, thoughtful selection and study of the text, and strategic planning for the read aloud delivery.

Jacobs, Morrison and Swinyard (2000) surveyed 1,874 teachers about their read aloud habits. Primary teachers demonstrated a tendency to choose narrative picture books for read alouds while intermediate teachers preferred chapter books. Contemporary survey data following the creation of CCSS on teacher selection of narrative versus informational text is not readily available. However, in a mixed methods study of the content of 1<sup>st</sup> grade classroom libraries, MacKay, Young, Muñoz, and Motzkus, (2020) found that the libraries in 23 classrooms contained approximately 23% expository text. Only two of the participating teachers reported that the CCSS had influenced their selections of classroom books.

Furthermore, in an examination of national association book lists, Dreher and Kletzien (2017) found that the percentage of expository texts recommended on book lists has not increased significantly since the creation of CCSS; narrative text continues to dominate the lists. From these studies, we can surmise that many classroom teachers have not yet shifted to a balance of expository and narrative selection for read alouds in the primary grades. This issue needs to be

addressed by teacher preparation programs, school leaders, professional development providers, curriculum developers, and children's book publishers so that the inclusion and celebration of nonfiction reading material becomes commonplace in elementary schools.

### **Promote Comprehension through Guided Retellings in the Primary Years**

The present study, particularly the results of the pre-assessment, revealed that summarizing expository text in writing is challenging for fourth-graders even when the text is read to them. Though retelling may be somewhat intuitive for young learners, it is primarily implemented with narrative text in the early grades (Baker et al., 2020; Parenti, 2018). In addition, it is typically practiced and assessed orally.

Extending the practice of orally retelling to other text structures in the primary years is a promising approach for promoting expository summarization readiness in the intermediate grades (Kingston et al., 2019; Qin, et al., 2019). Parenti (2019) recommends guided retelling in the primary years, a “low-risk practice of using verbal and visual prompts that offers support for students’ retelling of informational text when they act as young scientists, historians, or mathematicians.” (p. 474). The demands of expository text, i.e., background knowledge, semantic and syntactic structure, etc., need to be considered and consistently addressed in the primary years.

### **Conduct Action Research on Summarizing with Other Text Structures**

Our action research project demonstrated that students made significant growth with summarizing sequential text when provided with evidence-based strategies that are well suited to the text structure. Continued application of strategies like cloze summaries, graphic organizers, and Jot Dots could lead to growth with other text structures. Strategies and tools could be added to address the specific nature of descriptive, compare-contrast, problem-solution, and cause-effect



structures. Explicit instruction and multi-tiered learning experiences with signal words, graphic organizers, paragraph frames and paraphrasing could build a bridge to summarizing all text types.

Finally, action research is a powerful tool for classroom teachers as “a disciplined process of inquiry conducted *by* and *for* those taking the action” (Sagor, 2000). The research community, teacher educators, and school leaders should promote action research so that it becomes a regular, efficacious routine in our nation’s schools. It will take boots on the ground in our nation’s classrooms to defeat the persistent, but not undefeatable, fourth-grade slump.

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## Appendix A

### Rubric for Informational Text Summary (sequential text)

<b>Score</b>	<b>Indicators</b>
<b>4</b> Distinguished	<ul style="list-style-type: none"> <li>● Restates main idea and concluding statement in an interesting way.</li> <li>● Retells story in a meaningful sequence with at least three of the most significant details.</li> <li>● Uses interesting word choices.</li> <li>● Uses a variety of transitions and correct grammar and punctuation.</li> <li>● Writes legibly with very few spelling errors (0-3).</li> </ul>
<b>3</b> Proficient	<ul style="list-style-type: none"> <li>● Restates main idea and concluding statement in a clear way.</li> <li>● Retells story with at least three significant details.</li> <li>● Uses simple transitions and mostly correct grammar and punctuation.</li> <li>● Writes legibly with some spelling errors (3-6).</li> </ul>
<b>2</b> Apprentice	<ul style="list-style-type: none"> <li>● Main idea of the text is not stated clearly.</li> <li>● Identifies less than 3 significant details.</li> <li>● Copies some details directly from the text.</li> <li>● Uses simple sentences with the same beginnings; no transitions.</li> <li>● Some mistakes in grammar, punctuation, and/or spelling.</li> <li>● Writes inside or far away from the margin and/or has poor letter spacing and formation.</li> </ul>
<b>1</b> Novice	<ul style="list-style-type: none"> <li>● Does not state the main idea of the text.</li> <li>● Lists unimportant details.</li> <li>● Writes a summary that is very long or very brief.</li> <li>● Writes incomplete or run-on sentences.</li> <li>● Many mistakes in grammar, capitalization, punctuation, and/or spelling that impede understanding.</li> <li>● Poor penmanship; hard to read.</li> </ul>



## Appendix B

### Phase 1 Unit Plan for Summarizing Expository Text with Sequential Structure

Lesson	Instructional Delivery & Strategy	Materials	Scaffolds
1	Pre-test: Write a summary of the book.	<i>Humphrey, the Lost Whale</i> (Tokuda & Hall, 1986)	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> </ul>
2	Whole Class: Cloze summary	<i>The Tree that Would Not Die</i> (Levine, 1995)	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> <li>● Vocabulary pre-instruction and word bank</li> <li>● Gradual release of responsibility: teacher modeling, guided practice, partner work, independent work to complete cloze summary.</li> </ul>
3	Small Group Guided Practice: Cloze summary	<i>Earthquake!</i> (Harcourt leveled readers)	<ul style="list-style-type: none"> <li>● Vocabulary pre-instruction and word bank</li> <li>● Leveled readers (below/on-level/advanced)</li> <li>● Teacher support and guidance to complete cloze summary.</li> </ul>
4	Independent: Cloze summary	<i>Dolphin's First Day</i> (Zoehfeld, 1994)	<ul style="list-style-type: none"> <li>● Audio read-along option provided</li> <li>● Word bank</li> <li>● Immediate feedback while completing cloze summary</li> </ul>
5	Whole Class: Sentence strip summary	<i>The Water Cycle</i> (video by NBC Learn)	<ul style="list-style-type: none"> <li>● Vocabulary pre-instruction</li> <li>● Color-coded strips for topic sentence, supporting details, and closing sentence</li> <li>● Preplanned stopping points to discuss and make notes on strips</li> <li>● Gradual release of responsibility: teacher modeling for evaporation, guided practice for condensation, partner work for precipitation,</li> </ul>

			independent practice for accumulation.
6	Small Group Guided Practice: Sentence Strip Summary	<i>Change of Plans: Metamorphosis</i> (video by PBS Media)	<ul style="list-style-type: none"> <li>● Vocabulary pre-instruction</li> <li>● Color-coded strips for topic sentence, supporting details, and closing sentence</li> <li>● Preplanned stopping points</li> <li>● Gradual Release: Teacher models for frogs, partner work for dragonflies, independent practice for butterflies</li> </ul>
7	Whole Class: Introduction to Jot Dots Paraphrasing Technique	<i>Abe Lincoln, the Boy Who Loved Books</i> (Winters & Carpenter, 2003)	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> <li>● Strategy instruction on paraphrasing with Jot Dots (Greiner, 2018)</li> <li>● Gradual release of responsibility: teacher models, guided practice, partner work, independent work with graphic organizer</li> </ul>
8	Small Group Guided Practice: Jot Dots Paraphrasing Technique + ShowMe introduction	National Geographic Kids: <i>Amelia Earhart</i> (Gilpin, 2013)	<ul style="list-style-type: none"> <li>● Audio read-along option provided</li> <li>● Teacher support and guidance to complete Jot Dots graphic organizer</li> <li>● Teacher demonstration of ShowMe app and shared creation of a summary of Amelia Earhart.</li> </ul>
9	Independent: Jot Dots Paraphrasing Technique + ShowMe summary	Choice of book from basket (biographies, narrative nonfiction, etc.)	<ul style="list-style-type: none"> <li>● Student selection of book with guidance from teacher.</li> <li>● Immediate feedback while completing Jot Dots graphic organizer</li> <li>● Partner work to create ShowMe presentation of book</li> </ul>
10	Whole group and partner work: Scoring student exemplars of	Student-friendly rubric and checklist; highlighters	<ul style="list-style-type: none"> <li>● Discuss 5-star ratings and movies</li> </ul>

	summary of <i>Humphrey, the Lost Whale</i>		<ul style="list-style-type: none"> <li>● Model how to use checklist to look for and highlight indicators of a strong summary in an exemplar.</li> <li>● Strategically pair students and facilitate scoring of three student exemplars</li> </ul>
11	Post-test: Write a summary of the book.	<ul style="list-style-type: none"> <li>● <i>The Story of the Statue of Liberty</i> (Maestro, 1986)</li> </ul>	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> </ul>

### Appendix C

#### Phase 2 Unit Plan for Summarizing Expository Text with Sequential Structure

Lesson	Instructional Delivery & Strategy	Materials	Scaffolds
1	Pre-test: Write a summary of the book.	<i>Humphrey, the Lost Whale</i> (Tokuda & Hall, 1986)	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> </ul>
2	Whole Class: Cloze summary	<i>The Tree that Would Not Die</i> (Levine, 1995)	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> <li>● Vocabulary pre-instruction and word bank</li> <li>● Gradual release of responsibility: teacher modeling, guided practice, partner work, independent work to complete cloze summary.</li> </ul>
3	Small Group Guided Practice: Cloze summary	National Geographic Kids: <i>Amelia Earhart</i> (Gilpin, 2013)	<ul style="list-style-type: none"> <li>● Audio read along on getepic.com</li> <li>● Teacher support and guidance to complete cloze summary.</li> </ul>
4	Whole group and partner work: Scoring student exemplars of summary of <i>Humphrey, the Lost Whale</i>	Student-friendly rubric and checklist; highlighters	<ul style="list-style-type: none"> <li>● Discuss 5-star ratings and movies</li> <li>● Model how to use checklist to look for and highlight indicators of a strong summary in an exemplar.</li> <li>● Strategically pair students and facilitate scoring of three student exemplars</li> </ul>
5	Whole class and small group: Sentence strip summary	<i>Tornadoes 101</i> video (National Geographic); sentence strips; chart paper; transitional phrases anchor chart	<ul style="list-style-type: none"> <li>● Vocabulary pre-instruction</li> <li>● Color-coded strips for topic sentence, supporting details, and closing sentence</li> <li>● Preplanned stopping points to discuss and make notes on strips</li> <li>● Chart paper for collaborative summary in small groups.</li> </ul>
6	Independent Practice: Sentence Strips	<i>Jackie Robinson</i> leveled e-book (Reading A to Z)	<ul style="list-style-type: none"> <li>● Audio read-along if needed</li> <li>● Graphic organizer with strategic sections for topic sentence, supporting details, and closing sentence.</li> </ul>

7	Whole Class: Timeline	<i>Change of Plans: Metamorphosis</i> (video by PBS Media); timeline graphic organizer	<ul style="list-style-type: none"> <li>● Vocabulary pre-instruction</li> <li>● Gradual release how to use the timeline. Teacher models during frogs; partner practice for dragonflies; independent work for butterflies</li> </ul>
8	Whole Group: Introduction to Jot Dots Paraphrasing Technique	<i>How Crayons are Made</i> video (Discovery UK)	<ul style="list-style-type: none"> <li>● Strategy instruction on paraphrasing with Jot Dots (Greiner, 2018)</li> <li>● Preplanned stopping points for Jot Dots</li> <li>● Gradual release of responsibility: teacher models, guided practice, partner work, independent work with graphic organizer</li> </ul>
9	Small Group Guided Practice: Jot Dots Paraphrasing Technique	<i>How to Make Ice Cream</i> leveled e-book (Reading A to Z)	<ul style="list-style-type: none"> <li>● Audio read-along option provided</li> <li>● Teacher support and guidance to complete Jot Dots graphic organizer</li> </ul>
11	Post-test: Write a summary of the book.	<i>The Story of the Statue of Liberty</i> (Maestro & Maestro, 1986)	<ul style="list-style-type: none"> <li>● Teacher read-aloud</li> </ul>

## Appendix D

### Cloze Summary of the Biography of Amelia Earhart Epic Books

Use the **Word Bank** at the bottom to complete the summary. Not all words will be used.

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Amelia Earhart was known all over the world for being one of the first female \_\_\_\_\_ of all time. She was born in 1897 and grew up in \_\_\_\_\_. When Amelia grew up, she worked as a \_\_\_\_\_ and also worked at a center for children. She loved to help \_\_\_\_\_, but she loved \_\_\_\_\_ even more. She worked hard to earn money for flying \_\_\_\_\_. Her dream was to be the first woman to fly across the Atlantic \_\_\_\_\_. In 1932 she made the long, hard trip all by \_\_\_\_\_. The final challenge she set for herself was to fly around the \_\_\_\_\_. Crossing the \_\_\_\_\_ Ocean was the hardest part. Sadly, Amelia was never heard from again. Many people believe the plane ran out of gas. People still \_\_\_\_\_ her today as one of the world's greatest pilots.

#### **Word Bank:**

Ocean      nurse      world      pickle      pilot      herself      remember      lessons      people      air  
show      ladybug      Kansas      Pacific

*Now go back and highlight the transitional phrases. Use the anchor chart to help you.*

## Appendix E

### Summary: Jackie Robinson

*I can summarize the informational book about Jackie Robinson in six sentences.*

<p><b><u>Topic Sentence</u></b> Check off the one you like best.</p>	<p><input type="checkbox"/> Jackie Robinson was one of the greatest baseball players of all time.</p> <p><input type="checkbox"/> Jackie Robinson was an African American baseball player known for breaking the color barrier.</p> <p><input type="checkbox"/> The sport of baseball was changed forever by a brave man named Jackie Robinson.</p>
Detail #1	
Detail #2	
Detail #3	
Detail #4 (optional)	
Closing Statement (look at the topic sentence for help)	

## Appendix F

### Jot Dots

Main Idea Statement:

<i>Name it (title &amp; author)</i>	Verb it (tells, describes, explains, etc.)	Big Picture
-------------------------------------	--	-------------

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Rule of 5:  
Now jot down the main events in 5 WORDS or less.

BEGINNING (b) / MIDDLE (m) / END (e)

- \_\_\_\_\_ (b)
- \_\_\_\_\_ (m)
- \_\_\_\_\_ (m)
- \_\_\_\_\_ (m)
- \_\_\_\_\_ (e)

## Appendix G

### Student Writing Samples

Pretest: Summary of *Humphrey the Lost Whale: A True Story*



if Humphrey did not get help and the people were scared of wales and they were not his friends he would have got out of there. but they were Humphrey's friend and help him to not get sick.

Posttest: Summary of *The Story of the Statue of Liberty*

The Statue of Liberty was given to us from a young French artist named Bartholdi. One day a young man named Bartholdi came to visit from France. Then he saw a plain island. Bartholdi was inspired he wanted to build a statue for America to resemble America and France's friendship. When Bartholdi got back to France, he started making sculptures of the statue. In its right hand it would have a torch to welcome people to America. In its left hand it would have a tablet holding the date July 4th, 1776 to resemble America's freedom. It would have a crown that would have 186 steps to climb up to see the view. The statue was finished in 1886.