Exploring Reading Motivation and Engagement in Discipline-specific Classes

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Yongjun Lee

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Abstract

This three-paper dissertation was conducted to explore how motivation and engagement, in addition to cognitive aspects, should be considered in disciplinary literacy instruction and assessment in high school classrooms. The studies, which were based on a five-year collaborative school-university partnership, were conducted to explore the relation between literacy engagement and learning of high school students in social studies classes.

In the first study, I explored the perspectives shared by social studies teachers in planning instruction and applying a disciplinary literacy approach in their classes. Specifically, I investigated how teachers' discourse from collaborative planning sessions and interviews evidenced their understanding of and beliefs about the importance of teaching disciplinary literacy and engaging students in literacy and learning. From the analysis of the collaborative meeting conversation transcripts and interview data, three themes emerged: texts use, cognitive instructional practice, and motivation-enhancing practice.

In the second study, I explored how one social studies teacher embodied motivation and engagement in her instructional practices in disciplinary literacy learning. Findings were gleaned through an in-depth analysis of field notes and classroom artifacts. The study, which was based on a strategic engagement (SE) framework (O'Brien &Dillon, 2014), clarified how the participating teacher incorporated cognitive and motivational aspects in literacy concurrently to engage students as part of disciplinary literacy instruction in an instructional unit. From the analysis, three main themes, teacher-led practice, multimodal text use, and student-centered activity, emerged.

In the third study, I explored an approach to assessing students' motivation and engagement related to reading in a discipline. Specifically, I studied how useful the SE components are in enhancing students' reading engagement and achievement by analyzing students' responses to SE components when reading a discipline-specific text and responding to open-ended and questionnaire items. The findings demonstrated that if these SE components are supported, enhanced, or taught by teachers, students' reading engagement is improved.

Overall, these studies demonstrate that teachers should make motivation and engagement more explicit in teaching disciplinary literacy in their classes. Future studies should augment and explore discipline-specific instructional practices to enhance student engagement in reading by considering a range of engagement dimensions that can supported with explicit instruction and guidance.

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CHAPTER 1: INTRODUCTION

Reading is a crucial learning process because students acquire most of their knowledge from their reading. From a cognitive perspective, reading entails complex and multi-dimensional processes (Alexander & DRLRL, 2012; Kendeou & O'Brien, 2017; McNamara & Magliano, 2009). These cognitive processes have been the focus of a great deal of attention from literacy researchers over the last 40 years. Based on this attention, research on how readers comprehend information in text has been widely conducted (McNamara & Magliano, 2009). In the current literature, many reading theories conceptualize comprehension as the result of the students' cognitive processing of linguistic information (e.g., Gernsbacher, 1990, 1991; Kintsch, 1988; Zwaan et al., 1995). While this understanding of cognitive processes and strategies are beneficial for teaching practices, it is insufficient in fully accounting for and guaranteeing reading achievement (Wigfield et al., 2016).

Adding to literature on cognitive aspects, other research focuses on students' motivational or affective engagement with texts (e.g., Guthrie & Wigfield, 2000). This reading motivation and engagement topic has also been discussed in the field of literary studies, where reading has been defined as transaction (Rosenblatt, 1994), critical immersion or close reading (Ransom, 2003) and interpretation that subsumes both reader and text. In the classic book on understanding informational texts, *How to Read a Book*, Adler and van Doren (2014) posited that comprehension happens when readers strive to put themselves on equal intellectual footing with authors; and the authors stated that to truly understand a text is a form of enlightenment based on not only *why* authors write but what they mean. All of these perspectives include some kind of engagement—a state

of being immersed in reading in a way that is intentional—which is viewed as useful and valuable, and sustainable in the future.

In the broad field of literacy, researchers agree that motivation and engagement play a crucial role in literacy development and achievement (e.g., Afflerbach & Harrison, 2017; Baker & Wigfield, 1999; Guthrie & Wigfield, 2000; O'Brien et al., 2007). Hence, many researchers have attempted to explore what reading engagement is, how it can be enhanced, and how reading engagement affects learning. However, many educators or researchers still tend to emphasize separately either the cognitive or motivational aspects of comprehension or engagement with texts. This is problematic because emphasizing both cognitive and motivational aspects concurrently during reading is important in order to increase student engagement with texts (O'Brien & Dillon, 2014), especially given that engaged reading is necessary to fully comprehend texts (Wigfield et al., 2008).

In line with this perspective that engaged reading is necessary for comprehension I wanted to explore how motivation and engagement, in addition to cognitive aspects, should be considered in instruction and assessment in classrooms. In particular, investigating the teachers who participated in a school-university disciplinary literacy project helped us understand how content area teachers consider or enhance student motivation and engagement in discipline-specific classes.

Three studies in this dissertation were conducted to explore the relation between literacy engagement and learning of high school students in social studies classes. The first study focused on the social studies teachers' classroom discussions. The second study analyzed observational data from one social studies teacher to explore her instructional practices for students' motivation and engagement in literacy. Finally, the

third study used and analyzed students' responses to motivation constructs in answering reading questions about a discipline-specific text. In particular, the discipline-specific motivation questions are based on *Strategic Engagement* framework components discussed by O'Brien & Dillon (2014). The study presents which motivational constructs should be assessed and how.

Positionality and Personal Background

My personal experience as a teacher and doctoral student gives a sense of why I became interested in this program of inquiry. My teaching career began in a high school in a big urban city in South Korea when I was 26 years old. The age difference between the students and me was not that big, so students connected with me while I was able to sympathize with their culture and concerns. Above all, because I recognized why I was sometimes not motivated to read texts, I tried to apply that realization in my classes. I planned diverse reading activities and transformed some materials to make them more accessible for my students.

During my teaching in high schools, I engaged with many students who struggled with reading and were not motivated in reading, and the experience I gained working in Korea's competitive culture convinced me that, although federal standards and curricula might contribute to improving student test scores, the notion of proficiency and achievement in reading should be expanded to value the students' potential for developing their reading practices and thus to empower the marginalized readers often labeled as "struggling readers." This belief led me to investigate how best to motivate and engage students in reading in both print and digital environments and to explore a global perspective regarding reading policy and education.

I recognized that I needed to pursue more education to support the varied needs of the students I was serving. To this end, I decided to pursue an M.Ed. in Literacy Education (Korean Education) in Korea in order to understand how to teach reading better. Through the two-year program, I met my academic advisor for my master's degree. She had earned her Ph.D. in the U.S., and thus she had divergent thinking about literacy instruction and research. Under her guidance, I learned about literacy instruction and how to support the reading, writing, thinking, and learning process explicitly. My teaching improved and the results were evident in my students' increased enthusiasm, engagement, and literacy achievement.

Upon earning my M.Ed., I was better prepared to support comprehension and utilize reading strategies effectively, and my passion for reading education was further ignited. However, I still had more questions. Although students were in the same educational contexts in Korea, some students tried to read texts with explicit goal setting and motivation, while others seemingly did not. In other words, students were also expected to be motivated or engaged in predetermined texts, but only some of the students seemed to enjoy and feel the value of the reading. That means students regulated their cognition and motivation in reading differently by their own volition.

Also, I knew that researchers agree that giving multiple options to students can enhance their motivation and engagement, but I wondered how texts should be selected and taught since I had difficulty providing diverse reading options in Korean educational contexts. In high school contexts and the Korean language arts curriculum, it was difficult to deal with diverse materials because the Korean language arts teachers who teach high school sophomores or seniors needed to focus on texts that are necessary for

the students' school records or national college entrance exams. This limited the kinds of texts that could be used. Considering how and why students approach texts differently motivated me to continue learning about reading education, text selection and its use. Thus, I decided to pursue a Ph.D. in Literacy Education in the U.S. because many literacy-related studies have been conducted in diverse topics here and especially at the University of Minnesota, which has provided one of the strongest curricula for literacy education.

During my Ph.D program, in addition to focusing on motivation or engagement, I became aware of divergent literacies that impact student academic success, such as digital literacy, academic language, general school literacy, and disciplinary literacy. I was interested in viewing students as subjective agents who monitor, control, and regulate their cognitive, affective, behavioral, and social aspects in literacy activities. I imagined that once students developed motivational regulatory strategies in addition to literacy skills and strategies that served them well in various disciplines and contexts, they would experience more academic success and feel more comfortable in taking academic risks and accepting academic challenges.

In particular, participating in a disciplinary literacy project, which was designed to validate components of a multidimensional disciplinary literacy framework and to support high school students and their teachers in implementing the framework, enabled me to realize how important teaching both cognitive strategies and enhancing motivation and engagement are. The project also led me to recognize that teachers' instructional practices supporting cognition and motivation should be discipline-specific rather than generic across content area classes.

I now envision a school experience that supports students through explicit literacy instruction and motivational support. Once these literacies and motivation are practiced and become internalized, students and teachers will have more energy for deep learning, creativity, and innovation. A key component of this vision is preparing teachers for designing and implementing effective motivational supports for student engagement. The research studies presented in this dissertation reflect my initial understanding of how to help secondary teachers better understand how to stimulate and support student motivation for their engaged reading.

Problem and Rationale

As many researchers agree, reading entails complex cognitive and multi-dimensional processes (Kendeou & O'Brien, 2017; McNamara & Magliano, 2009). Thus, researchers have conducted studies on how readers comprehend texts cognitively and which cognitive strategies they use. Many teachers also believe that teaching cognitive reading strategies helps students develop their reading comprehension and achievement. Those educators and researchers argue that reading comprehension is mainly developed by teaching elements such as decoding, vocabulary, cognitive strategies, and metacognition (e.g., Baker & Beall, 2009; Duke, & Pearson, 2009; Kendeou et al., 2016). For example, they discuss what practices for developing a reader's cognitive skills are effective, how comprehension strategies are different according to disciplines, and how the reader's metacognitive and self-regulated monitoring should be enhanced.

Alternatively, other researchers argue that motivation and engagement play a crucial role in literacy development and achievement (e.g., Afflerbach & Harrison, 2017; Guthrie & Wigfield, 2000; O'Brien et al., 2007). While decoding, vocabulary, fluency,

and comprehension enable students to be skillful and strategic readers, without the motivation to read or engagement in reading, students will have difficulty reaching their full potential as literacy learners (Gambrell, 1996; Wigfield et al., 2016).

Recently, American teens have not ranked well internationally in reading. Compared to the 76 other education systems in the Program for International Student Assessment (PISA) in 2018, the U.S. average reading literacy score was lower than the average in eight countries' education systems, higher than the average in 57 countries' education systems, and not measurably different from the average in 11 other countries. Concurrently, even considering the previous data, US teens reached only 15th in ability to interpret and retrieve information from text (Brozo et al., 2007). Brozo and his colleagues maintained that educators and researchers should focus on increasing the time allocated to reading, increasing engagement for boys, and increasing the diversity of texts that students read. Brozo et al., (2014) again noted that girls are more engaged and better readers than boys. Overall, these international surveys indicate that adolescents in the United States are ranked not that higher in the world. This has prompted researchers to focus more on reading engagement because this is known to increase students' academic achievement (Guthrie et al., 2012), and indeed many studies on reading engagement have been conducted since 2011 (Lee & Van Deventer, 2019).

Secondary teachers in middle and high school settings often identify as content experts, (O'Brien et al., 1995; Shanahan & Shanahan, 2012) prioritizing the "coverage" of content (Calder, 2006). Even though secondary teachers often use reading and writing as tools to cover and assess content, they resist explicitly teaching disciplinary literacy reading and writing (O'Brien, Stewart, & Moje, 1995; Shanahan & Shanahan, 2008). In

this dissertation, I focused on high school social studies teachers who reported they felt ill-equipped to support their students' literacy needs.

Teachers also feel they need more information and strategies to motivate students to read (Gambrell, 1996). The teachers espousing this crucial role of motivation and engagement try to prepare reading activities or build class environments in which student reading motivation can be enhanced or make texts more accessible by considering students' interest and attitude toward topics or reading. However, in most cases, one of the problems is that many teachers tend to emphasize only cognitive aspects or motivational aspects, or, they just focus on cognitive strategies or skills in their teaching because they see motivation as determined by the surrounding environment or text factors whereas teachers should view motivation and engagement factors as constructs they can connect more clearly to explicit instruction in their classes.

Purpose and Significance of This Research

This alternative format dissertation aims to explore how reading motivation and engagement as well as cognitive strategies are embodied and supported by teachers in the design and implementation of disciplinary literacy. To achieve this aim, this dissertation focuses more on teachers' practices that make engagement explicit by considering the purposes of modeling, instruction, guided practice, and by considering that strategic reading means engaged as well as cognitively sophisticated reading.

As argued, many educators have focused only on teaching cognitive strategies or skills for student reading comprehension. However, some researchers argue the parallel importance of cognitive and motivational aspects during reading and the use of methods to constantly enhance student reading motivational factors (e.g., O'Brien & Dillon,

2014). That is, some researchers maintain the necessity of making motivation and engagement explicit during instruction. However, there are still few studies that focus on the parallel focus of literacy motivation and engagement. Particularly what teachers typically do in their classes to support student literacy motivation, and how student motivation and engagement can be explored or assessed to inform instruction. The three studies of this alternative format dissertation explore various aspects of the relation between motivation and engagement and disciplinary literacy.

The first study explores perspectives social studies teachers reveal in applying a disciplinary literacy approach in their classes. Specifically, I investigate how teacher discourse evidences the understanding of and importance of not only teaching disciplinary literacy but also engaging students in learning.

In the second study I use observational data to explore what a teacher does to engage and motivate students in her classes in addition to how she teaches cognitive strategies. In particular, this study is explored through general reading engagement perspective and the ideas of strategic engagement (SE) framework in reading (O'Brien &Dillon, 2014). In the study I focus on the kind of instruction that can best take advantage of the dynamic and reciprocal relationship among motivation, engagement, and multiple dimensions of comprehension in reading. This study clarifies the extent to which the teacher focuses on enhancing student motivation and engagement and how the notions of SE framework could be implemented to engage students as part of disciplinary literacy instruction in an instructional unit.

In the third study I explore how teachers can assess students' motivation and engagement related to learning in a discipline and within a framework in which

disciplinary literacy is considered. This is demonstrated by how students respond to SE components when reading a discipline-specific text and responding to SE component items that tap the relationship between these SE framework components and high school students' reading scores.

These studies are important because they can promote understanding of how much teachers emphasize motivation and engagement in their content area classes and how teachers support student engagement in reading systematically by considering the parallel or reciprocal relationship between cognitive and motivational processes. This research is also valuable because it helps illuminate which elements should be emphasized to promote *balanced* engagement instead of only emphasizing cognitive aspects in class. Additionally, the studies can offer clues as to how to foster learning environments that support struggling adolescents in developing literacy skills and engagement. The work is also based broadly in social justice tied to equity in academic access to school curricula, specifically, that all students should have access to the most advanced curricula in school—e.g., Advanced Placement (AP) classes that have carefully considered instruction and curricula development (O'Brien et al., 2017).

Methodological Framework

The studies in this dissertation are conducted from the perspective methodological pragmatism (Dillon & O'Brien, 2018) in that they are focused using multiple epistemological stances and methods, both quantitative and qualitative, in investigating teachers' instructional practices and materials used to enhance motivation and engagement as well as cognitive strategy teaching in their classes. Paradigm can be defined as "a conceptual system, clearly separate from other conceptual systems, with a

self-sustaining, internal logic, constituted as a set of epistemological rules directed at solving problems matched to the logic and rules" (Dillon et al., 2013, p. 1109). Many literacy researchers embrace the paradigmatic assumptions as crucial. However, since paradigms have restricted the flexibility and creativity of research by limiting vision and polarizing competing research communities, pragmatism can be suggested as an alternative (Dillon et al., 2000; Dillon et al., 2013; Dillon & O'Brien, 2018).

Through the lens of pragmatism, researchers should not adhere to a particular methodology, methods, or research design. Instead, they are expected to follow the spirit of the pragmatic tradition that "conducting inquiry to useful ends takes precedence over finding ways to defend one's epistemology" (Dillon et al., 2013, p. 1118). In this approach, "knowledge and 'research results' are simply those used and thoughtfully understood to be useful to real people in real contexts" (Dillon & O'Brien, 2018). That is, the pragmatic approach emphasizes how the research, including problem identification, method use, and findings, is useful and desirable.

Researchers working within a pragmatic epistemology put existing theories into practice in authentic settings, rather than solely maintaining theoretical purity. Dillon and her colleagues (Dillon et al., 2000; Dillon et al., 2013) outlined the characteristics of research from pragmatism. Above all, research from a pragmatic stance emphasizes the integration of participants' opinions compared to traditional research in which a researcher establishes a question or problem and designs all procedures. Thus, researchers have to spend more time with collaborative participants to identify the research problems and to think about the concerns and implications associated with their decisions.

In this collaborative, community-based approach researchers and participants (in this case, teachers) worked to develop a partnership where engagement is central to the work, authentic communication and dialogue are maintained, and all members bring their respective expertise. Second, research grounded in pragmatism may select from a range of data types and use a variety of analytical strategies in order to answer and solve practical questions. Although using diverse methodologies can either strengthen a study or lead to its downfall, researchers should be free to use appropriate methods for solving problems. These characteristics of the pragmatic approach enhance practicality, which means "the user-friendliness of research findings, that is, research findings that are useful for teachers in that teachers can translate them to their own practice" (Van Velzen, 2013, p. 792).

This dissertation employs mainly qualitative data collection and analysis, but it also employs some quantitative methods and data. By focusing on and analyzing field-based data, in this dissertation research I try to understand participants' perspectives and instructional enactments in the contexts of an actual school, its IB programs, and classes included in the program. The study also analyzes quantitative data from an assessment instrument focusing on their responses to motivation factors related to reading.

In this way, this dissertation also employs a mixed methods design in that it collects and analyzes both qualitative and quantitative data in response to research questions (Creswell & Plano Clark, 2017). Mixed methods research encourages the uses of multiple epistemologies and is practical in the sense that researchers are free to use all methods possible to address research problems. Considering this, the mixed methods approach is compatible with the pragmatic perspective mentioned above, which emphasizes the

practical use of methods across both quantitative and qualitative research methods according to research questions.

Overview of the Frederick Douglass Project

This dissertation research is based on a five-year project, the Frederick Douglass High School (pseudonym) Disciplinary Literacy Project, focusing on disciplinary literacy instruction in the International Baccalaureate (IB) program in social studies. The teachers who participated in the project reported they felt ill-equipped to support their students' literacy needs. To support the teachers, a university-school partnership with a local Midwest university was established. This partnership aimed at helping teachers and students take advantage of disciplinary literacy practices in supporting their learning. The studies in the dissertation investigates the practices of the teachers or their students.

Fredrick Douglass is a five-year urban high school, situated in a mid-sized city in the Midwest. It serves approximately 1100 students. Of the student population, 92% are students of color and 90% qualify for free and reduced lunch. The majority of these students will be first generation college students if they chose to pursue postsecondary education. Frederick Douglass has offered the International Baccalaureate (IB) Diploma Programme since 1987, which has been a source of pride for the school community.

In one of the poorest neighborhoods in the city, Frederick Douglass and its faculty were deeply committed to making IB classes a successful experience for all students wishing to enroll, making it part of their social justice and equity goal. Rather than admitting only the traditionally "high academic" students who are usually white and college bound, they strived to make the curriculum accessible to students that represented the actual demographic profile of the building. The faculty at Frederick Douglass knew

that ensuring that their students experience success in IB courses required scaffolding disciplinary literacy practices. They asked our team from the university to partner with them on this endeavor. To do this effectively, teachers worked with us to modify the curriculum more broadly and the specific reading and writing tasks of the IB curriculum, so the content was accessible for all students. The four teacher participants Catherine, Michel, Dawn, and John were committed to their students' academic success.

Summary

In this chapter, I noted that although there have been many attempts and studies to enhance student reading motivation and engagement, many educators still tend to focus on teaching cognitive processes in reading in their classes and they tend to not emphasize how to engage their students in reading. To address this problem and encourage exploration of how teachers recognize the importance of both cognitive and motivational aspects in class and how they try to enhance students' motivation and engagement, I analyzed the teachers' perspectives and instructional practices. This analysis began with the broad notion of the SE framework (O'Brien & Dillon, 2014), which emphasizes the parallel importance of cognitive and motivational aspects in class by focusing more on making motivation and engagement more explicit. In particular, one of the studies in this dissertation investigated which discipline-specific motivation questions based on the SE components can be used to best guide.

In Chapter 2, I review the relevant theoretical and empirical literature relevant to this dissertation. The literature review focuses on disciplinary literacy, reading engagement, and the SE framework. It should be noted that Lee (2019) was written and published, based on the section of disciplinary literacy in this chapter.

Chapter 3 details a study of what perspectives social studies teachers reveal when they apply the disciplinary literacy approach to their classes. The analysis of the collaborative meeting transcripts demonstrates how much the teachers consider cognitive and motivational aspects. Lee et al. (in press) was written and accepted, based on this study.

Chapter 4 presents a study that explores what one teacher does to engage and motivate students in her classes in addition to how she teaches cognitive strategies.

Chapter 5 is a study that examines how students respond to the SE components when reading a discipline-specific text. From this study, in addition to the roles of the SE framework components in reading texts, the research points to which motivational components teachers should consider in assessing students' motivation is investigated.

Finally, Chapter 6 presents theoretical assertions or discussions and conclusions drawn across the three studies that focus on developing pedagogical implications in the dissertation. Also, based on the discussion across the three studies in the dissertation, an instructional model of the SE framework is suggested in Appendix C.

CHAPTER 2: REVIEW OF LITERATURE

The purpose of this research was to explore how teachers in content area classes consider both motivational aspects and cognitive aspects of instruction and assess students' motivation to engage students in reading. Three theoretical frameworks are important to the research: disciplinary literacy, reading engagement, and strategic engagement (SE). Relevant literature, definition, dimensions, and factors for each framework are reviewed in this chapter.

Disciplinary Literacy

The notion that every teacher is a teacher of reading has been a major educational perspective in literacy research for many years (Alvermann & Moje, 2013). Traditionally, *content literacy*, which is defined as "the ability to use reading and writing for the acquisition of new content in a given discipline" (McKenna & Robinson, 1990, p. 184), has played an important role in both research and instruction resulting in many reading and writing strategies designed to maximize students' content learning across the curriculum. This idea, that every teacher should understand how to use literacy, particularly reading and writing strategies to support learning, has engendered national policies that include required content literacy courses for every teacher candidate registered in secondary education licensure programs in most states in the US.

However, even when *content area literacy* was the predominant framework, some teachers were skeptical about this literacy education trend (Alvermann & Moore, 1991; O'Brien et al., 1995; Shanahan & Shanahan, 2008) because the "infusion" of strategies from outside did not effectively tap disciplinary traditions and practices from inside the respective disciplines (Hinchman & O'Brien, 2019). Many researchers and educators

were reluctant to apply this infusion framework to their content instruction because they considered it a double burden (i.e., teaching both subject content and literacy) and because many reading and writing instructional strategies are simply not applicable to specific subject instruction. Therefore, a *disciplinary literacy* (DL) framework was proposed as an alternative way to understand and examine the literacy practices of adolescents in a manner that is specific to each discipline.

The content-area literacy/DL divide has generated a heated debate among literacy researchers and educators. Moje (2008) argued that we need to move away from generic, content-area teaching strategies, focusing instead on developing DL, which involves the specific discipline-based thinking strategies and language skills used in different fields of study or "disciplines." In contrast, Heller (2010) argued that subject area teachers in middle and high schools are not well-equipped to teach according to the DL perspective, and that DL should therefore be left to the college-level disciplinary studies where students focus more on becoming disciplinary experts. Later, Brozo et al. (2013) suggested that it was important to "avoid creating what might be a false dichotomy and instead [to] consider how a blend of practices from both approaches can serve the needs of all students" (p. 354).

This debate revolves around the question of what the ultimate goal is in educating adolescents about their literacy practices. There is considerable conceptual abstractness and inconsistency in perspectives on DL. For example, when Moje responded to Heller's critique on her earlier article (Moje, 2008), she pointed out that the notion of DL might have been misunderstood by saying, "[disciplinary literacy] instruction is decidedly not about producing disciplinary experts or about trying to push the college curriculum down

to high school (another concern that he appears to have about disciplinary literacy)" (Moje, 2010, p. 276). Gillis (2014) demonstrated another conceptualization of DL in her criticism of others in the field for what she described as a misunderstood notion of DL that reduced the argument to general literacy strategies versus discipline-specific strategies.

Definitions and Purposes of Disciplinary Literacy

The concept of DL is still contested, and several representative DL scholars have attempted to define the term (Table 2.1). Although they all provide slightly different definitions, these scholars provide definitions of DL that include both literacy (literacy practice or literacy skills) and notions about disciplinary domains. In this way, DL can be simply defined as domain-specific literacy skills and practices that are needed or used in a discipline. Content literacy tends to focus on teaching a set of generalizable strategies and study skills that can be used across content areas, whereas DL emphasizes the specialized literacy practices that are used by those who create, communicate and employ knowledge within each of the disciplines.

Table 2.1 Definition of Disciplinary Literacy (Lee, 2019, p. 65)

Scholar	Definition and its source
Roni Jo Draper	▪ The ability to negotiate (e.g., read, view, listen, taste, smell, critique) and create (e.g., write, produce, sing, act, speak) texts in discipline-appropriate ways or in ways that other members of a discipline (e.g., mathematicians, historians, artists) would recognize as "correct" or "viable." (Draper & Siebert, 2010, p. 30)

	▪ Facility with all the texts used to make sense and participate in the disciplines (e.g., traditional print, images, gestures, diagrams, models, etc.) (Draper, 2015, p. 58)
Zhihui Fang	▪ The ability to engage in social, semiotic, and cognitive practices consistent with those of content experts (Fang, 2012, p. 19)
Elizabeth B. Moje	▪ The specialized literacy practices of a given disciplinary domain, such as mathematics or history or visual art (Moje, 2015, p. 256)
Timothy Shanahan and Cynthia Shanahan	▪ Literacy skills specialized to history, science, mathematics, literature, or other subject matter (Shanahan & Shanahan, 2008, p. 44) ▪ The idea that we should teach the specialized ways of reading, understanding, and thinking used in each academic discipline, such as science, history, or literature (Shanahan & Shanahan, 2014, p. 636)
Daniel Siebert et al.	▪ A discipline-appropriate way of reading (i.e., interpreting) and writing (i.e., creating) a particular type of text (Siebert et al., 2016, p. 28)

The representative DL researchers have similar perspectives on the aims of DL, as shown in Table 2.2. In fact, DL can be explained in terms of a range of academic frameworks (e.g., Hinchman & O'Brien, 2019; O'Brien & Ortmann, 2016), such as socio-cognitive (e.g., Shanahan & Shanahan, 2008, 2012), social and functional linguistic (e.g., Fang, 2012; Fang & Coatoam, 2013) and socio-cultural perspectives(e.g., Moje, 2008, 2015).

Shanahan and Shanahan take more of a cognitive perspective that focuses on explicit aspects of reading and writing. They place their main focus on the differences between disciplinary experts, such as historians, scientists, and subject area teachers, and novices like students. These contrasting levels of expertise reveal that disciplinary experts

and subject area teachers employ different literacy skills and strategies from each other based on the disciplinary expertise, and their practices are also different from one another (Shanahan & Shanahan 2008; Shanahan et al., 2011).

The Shanahans also classified literacy development into three phases — basic literacy, intermediate literacy, and DL (Shanahan & Shanahan, 2008). Based on these differences, they argued that the purpose of DL teaching is to allow students to acquire disciplinary skills and knowledge akin to that of the experts, and that to achieve this end the teaching process requires a close collaboration with literacy experts. Interestingly, their perspective changes somewhat in their later work where their emphasis shifts away from literacy skills to cultures of practice. In a later publication, Shanahan and Shanahan (2014) consider disciplines as cultures of practice and recognize that each discipline has its own norm for how knowledge should be created, shared, and evaluated, taking their examples from the differences among history, science, and literature.

Table 2.2 The Aims or Purposes of Disciplinary Literacy (Lee, 2019, p. 66)

Scholar	**The aims or purposes of disciplinary literacy**
Timothy Shanahan and Cynthia Shanahan	▪ The aim of disciplinary literacy is to identify all such reading- and writing-relevant distinctions among the disciplines and to find ways of teaching students to negotiate successfully these literacy aspects of the disciplines. (Shanahan & Shanahan, 2012, p. 11)
Zhihui Fang	▪ The development of students' "ability to engage in social, semiotic, and cognitive practices" consistent with those used by content experts. (Fang & Coatoam, 2013, p. 628)
Roni Jo Draper	▪ My approach to literacy instruction is shaped by my views of disciplinary participation and literacy. I contend that the purpose of

	literacy instruction for content-area classrooms is to prepare students with all the cognitive and social knowledge and skills necessary to participate fully in disciplinary activities. (Draper, 2015, p. 58)
Elizabeth B. Moje	▪ Disciplinary literacy is about providing learners with the opportunity to engage in the kinds of knowledge production and representation, on a limited scale. (Moje, 2010, p. 275) ▪ Providing all students with the opportunity to understand how disciplines work and to raise questions about the trustworthiness of disciplinary knowledge. (Moje, 2015, p. 259)

Fang's main focus is on the semiotic aspects of each discipline (Fang, 2012). He argued that disciplinary discourses are constructed utilizing distinct language patterns that enable content experts to conduct their work more effectively, so recognizing these discipline-specific language usages can help students learn about how different disciplines organize knowledge, thus enabling students to use literacy skills in the disciplines. In particular, he posits that "the difficulties of disciplinary texts lie not just in words, but more broadly in the discourse grammar, or language patterns" (Fang, 2012, p. 31); this indicates the importance he places on a functional focus on language.

Thus, Fang and his colleague suggested a more concrete approach for the teaching of DL, arguing that a functional focus on language can provide a fresh perspective for teaching and learning (Fang, 2012; Fang & Schleppegrell, 2010). He defined functional language analysis as "an approach to secondary content area reading grounded in systemic functional linguistics" (2008, p. 591), adopting the approach of systemic functional linguistics proposed by Halliday (1994)

> SFL is a social semiotic theory that sees language as a resource for making meaning in context, where the language choices reflect and enact the context and the context predicts or suggests the language that will be used. Speakers and writers make (typically unconscious) choices from the various options that language makes available, according to the social and cultural contexts in which meaning is exchanged. As an interlocking set of grammatical systems, language enables its users to make different kinds of meaning for different purposes and contexts. Thus, variations in language patterns express the diversity of structures and processes in the social system (Fang & Schleppegrell, 2008, p. 591).

At the secondary school level, as educational knowledge becomes specialized and difficult, and language structure also becomes complex, functional language analysis enables students to understand how meaning is presented in each discipline; and teachers can help their students learn the specialized patterns in disciplinary texts (Fang & Schleppegrell, 2010). Thus, by offering "teachers practical tools for engaging students in systematically analyzing the language patterns and discussing the meaning of these patterns in disciplinary texts" (Fang, 2012, p. 32), teachers can enable their students to generate, communicate, and evaluate, disciplinary knowledge.

Compared to the other scholars mentioned above, Moje (2007, 2008, 2010, 2015) takes a broader perspective in discussing DL. She attempts to explore DL from a sociocultural perspective, emphasizing that teaching in DL aims to develop not only disciplinary learning but also civic participation and social justice, while arguing that teaching supports the development of new kinds of knowledge (Moje, 2007, 2015). According to her perspective, "disciplinary literacy theory and research suggest possibilities for the development of rigorous subject matter knowledge" (Moje, 2007, p. 33), and this subject-matter knowledge, being produced and analyzed in multiple forms, will eventually benefit society (Moje, 2007). In particular, Moje argues that since

disciplinary knowledge is (re)produced and communicated in everyday practice from each discipline, young people should have access to the practice, and this will give them the power to read and become critical readers and thinkers (Moje, 2007). She explains her perspective on DL as follows:

> Equally important to my conception of disciplinary literacy is the recognition that the disciplines are cultures in which certain kinds of text are read and written for certain purposes and with or to certain audiences. As a result, the texts read or written in a given disciplinary culture demand particular kinds of literacy practice relevant to the needs, goals, and conventions of those purposes and audiences (Moje, 2015, p. 257-258).

By linking DL to practices and discourses in individual disciplines and showing how this relates to the culture and to the power and identity formed through interactions with each discipline, Moje (2007, 2008, 2015) expands the DL perspective.

Moje emphasized the importance of DL teaching in which knowledge in the disciplines is produced or constructed as a result of human interactions, and society needs this disciplinary knowledge (Moje, 2007, 2008), recognizing that each discipline is not only a discourse but also a culture (Moje, 2015). Regarding teachers' roles from this perspective, Moje asserted that subject area teachers should provide students with opportunities to examine the discourse in relation to the practice and discourses of everyday life; she pointed out that teachers can employ multiple diverse genres, text types and new media materials to build knowledge and help their students engage with the disciplines; and recommended that teachers should also provide opportunities for students to hone their metadiscursive skills, which are not only useful for engaging in many different discourse communities but also for knowing how and why they are engaging in terms of social positioning and power relationships (Moje, 2008).

Moje (2008) was also very aware of the problems that teachers who pursue DL teaching can encounter in real-world classrooms. Teachers need to consider their students' disciplinary background knowledge and literacy skills and recognize the gaps between students' academic levels. Learning motivation, which leads students to engage in each discipline by adopting an appropriate identity as a historian, scientist, and so forth, is also a crucial factor for students. Moreover, teachers benefit greatly from a supportive school structure and opportunities to work across disciplines and plan for inquiry unit approaches based on a heuristic (Moje, 2008, 2015). Although there are inevitably limitations or difficulties for DL teaching, Moje maintained that "disciplinary literacy teaching can be considered a form of socially just teaching" (Moje, 2015, p. 259) that equips students to become active participants in a democratic society (Moje, 2008).

Teacher Beliefs and Perspectives on Disciplinary Literacy

It is a given that students are affected by teachers' teaching practices. These practices, which influence both student achievement and learning, are often impacted by teachers' perspectives on their own teaching practice and content expertise. For example, many empirical studies demonstrate that students' achievement is affected by teachers' efficacy beliefs (Caprara et al., 2006; Ross & Gray, 2006), culturally relevant beliefs (Love & Kruger, 2005), and pedagogical content beliefs (Staub & Stern, 2002). These studies reveal the importance of teachers' pedagogical beliefs and practices.

There are some studies that shed light on teachers' beliefs and perspectives on DL (e.g., Doerr & Temple, 2016; Masuda, 2014; Saunders & Ash, 2013). While limited in number, some of these studies include the perspectives and practices of social studies teachers. Pytash (2012) found that the preservice teachers in social studies have an

understanding of themselves as members of discourse communities and understand writing approaches unique to their discipline. Carlson (2015) observed how one beginning history and social studies teacher's understanding of DL developed. From a secondary literacy course, the teacher recognized the importance of reading a range of texts (e.g., photographs, bicycles, commodities) from diverse perspectives (e.g., race, social class, and gender), and to use discipline-specific reading processes such as sourcing, corroboration, and contextualization— disciplinary literacy skills explored by Wineburg and his colleague (Wineburg, 1991; Wineburg, 1998; Winburg & Reisman, 2015).

Howard and Guidry (2017) focused on the efforts to develop preservice teachers' beliefs and perspectives on DL through methods courses. The courses, which were co-taught by a literacy instructor and a history/social studies methods instructor, supported integrating literacy strategies in practicum experiences that would help engage high school students with texts in discipline-specific ways. As is suggested by research, most beliefs and perspectives of preservice teachers tended to focus specifically on DL. However, current practicing teachers may have different foci or specific pedagogical and disciplinary beliefs and perspectives. Specifically, research demonstrates that while teachers recognize that each discipline has a unique approach to literacy (e.g., Spires et al., 2018), there are substantial differences in terms of literacy and the role in learning in disciplines. In addition, despite some discrepancies in concrete applications, content area teachers can better support student comprehension and engagement by integrating DL into their practice. Regarding these, Howard and Guidry's (2017) study is significant in

that it is based on social studies teachers who have taught within their content area for several years.

Disciplinary Literacy in History

DL can be defined from within a discipline (O'Brien & Ortmann, 2016). Here, I focus on DL in history. Literacy and thinking skills in history, particularly reading in history draw from the work of Wineburg and his colleagues (Wineburg, 1991; Wineburg et al., 2013; Wineburg & Reisman, 2015). According to them, historians focus on sourcing, corroboration, and contextualization when reading and evaluating primary and secondary sources. With sourcing, readers investigate authors' credentials and interest, and the position they take on the topics they narrate. Corroboration refers to checking important details by comparing multiple documents. Readers examine various texts to understand how information on a particular topic can be confirming or contradictory. Contextualization involves readers in situating documents in the time and place of their creation so readers can gain greater insight into the historical period and the potential impact of contextual factors. The researchers note that in historical writing writers should focus on factual and interpretive accuracy, persuasiveness of evidence, sourcing of evidence, corroboration of evidence, and contextualization of evidence (Monte-Sano, 2010), or focus on substantiation, perspective recognition, and contextualization (De La Paz et al., 2017).

Reading Engagement

Interestingly, although there has been extensive research on engagement, reading engagement research seems to have developed somewhat independently rather than closely influencing or being influenced by other engagement research. This may be

because students' engagement in general learning contexts tends to be influenced by diverse personal, environmental, and contextual factors but reading engagement is based on specific actions with texts.

Reading engagement is relevant to similar concepts and can be discussed in terms of diverse perspectives. Thus, in this chapter, first, the concepts of involvement and flow are discussed. And then, reading engagement from reader response theory, psychological perspectives, sociocultural perspectives, and affective perspectives is discussed. Finally, the relation between motivation and engagement is reviewed.

Engagement as Involvement and Flow

Engagement in reading has been discussed in conjunction with similar concepts such as involvement (Reed & Schallert, 1993) and flow (Csikszentmihalyi, 1991). Schallert and Reed (1997) examined the specific characteristics of involvement. They contended that involvement refers to "the experience a reader has when engrossed by the author's creation of the textual world" (p. 68), so when readers are involved in a task, their attention is wholly concentrated on that task, making a sense of time irrelevant. When there is intense involvement, a coupling of understanding/comprehension and concentration occurs (Reed & Schallert, 1993). This involvement can happen when an individual's abilities and the challenges of a task are optimally matched. The researchers noted that "involvement [operates] as a special type of engagement, and engagement subsumes involvement—it is possible to be involved in a task without first being engaged" (Schallert & Reed, 1997, p. 70); the researchers went on to argue that involvement is influenced by cognitive and motivational/affective factors.

The term *flow* is defined differently by different researchers. For example, Csikszentmihalyi (1975) initially defined it as "the holistic sensation that people feel when they act with total involvement" (p. 35) and went on to apply the concept to a wide range of activities such as sports and music rather than focusing solely on reading. According to Csikszentmihalyi and his colleague (Csikszentmihalyi, 1991; Nakamura & Csikszentmihalyi, 2014), attention plays a crucial role in entering and maintaining a flow status. In order for flow to be embodied, some conditions should be satisfied, namely that the perceived challenges from a task and skills are above the individual's average levels[1], and the individual should have clear goals to support feedback on these actions. Csikszentmihalyi contended that flow lies at the junction of cognitive and affective processes. Considering the definitions and characteristics of involvement and flow, although these concepts seem to be very similar to each other, flow may actually be the status of extreme or intense involvement.

Reader Response Theory

One could say that the notions of reading engagement and engagement research were initiated by reader response theorists, even though initially they did not directly use or emphasize the term engagement. In particular, Rosenblatt's work is placed in the beginnings of contemporary response theory (Marshall, 2000). Rosenblatt (1994) explored why readers find different types of satisfaction in literature. In her works, Rosenblatt emphasized how the reader's experiences are lived through their involvement with the text, arguing that literature offers readers an emotional outlet and that there are

[1] According to Nakamura and Csikszentmihalyi (2014), in the original model of the flow state, flow can only occur when the perceived challenges are in balance with the individual's perceived skills (e.g., Csikszentmihalyi, 1991).

unconscious factors that motivate reading enactments. Although she did not use the term reading engagement, she recognized that readers are deeply involved with literature and conceptualized what that experience is.

Enciso (1990, 1996) extended our understanding of the nature of engaged readers and the characteristics of such readers' responses to literature. In her doctoral dissertation, Enciso (1990) explored the nature of children's engagement with stories and defined engaged readers as readers who "pay attention to the story world; they describe their relationship with the characters and events, and they have a sense of entering into another realm" (p. 6). Through the fifth-grade children's retrospective and introspective accounts of reading, Enciso demonstrated that engagement is indeed an important factor in reading and engaged readers use a range of strategies that disengaged readers do not. Disengaged readers are not as active as participants; they are, rather, more compliant followers of the story world.

In other research, Enciso (1996) again examined the form and substance of one child's engagement in reading when she read and responded to familiar and unfamiliar texts, with friends and by herself. Enciso demonstrated that the participating child used a wide range of engagement strategies when reading her familiar stories, but she had difficulty creating and sustaining similar engagement strategies when reading unfamiliar stories. Although the findings are important, a more notable point is how she defined engaged reading and engagement in her study:

> [Engaged reading is] an aesthetic reading that includes attention to information, textual structures, and evaluative responses. … [being] constructed within a social context that both informs and is informed by the literacy practices and interrelationships surrounding reading …[and engagement is] a complex interplay of personal, emotional, visual, and

> evaluative experiences and perceptions that are typically felt privately but also may be expressed publicly among a community of readers who share a variety of purposes, interpretations, and interests in reading (1996, p. 172-173).

According to these definitions, the focus of engaged reading in her 1996 study was broader than in her 1990 conception. In the previous study, she focused more on the story or text itself, but later she understood engaged reading (or reading engagement) as a reader's intense attention and involvement with various textual elements by considering elements beyond the text. Based on this understanding, she went on to focus on the engaged readers' social and contextual factors that may affect engagement.

Wilhelm (1997) argued that thinking about literary reading engagement is a powerful move for teachers and students because it helps implement reader response theory into classrooms and provide opportunities and activities that help develop students as readers in both their abilities and attitudes. He defined engagement in reading as a time when "the reader uses a variety of moves and strategies to enter and involve herself intensely in worlds of meaning" (p. 144). According to Wilhelm, engaged readers respond to texts in a variety of creative and productive ways and their responses are intensely visual, empathic, and emotional. These definitions based on the reader response theory reveal that reading engagement occurs as a response to reading text, and literary works can function as important textual sources.

Psychological/Socio-cognitive Perspectives

Educational researchers have investigated why students engage in learning activities and the extent and nature of that engagement. Many motivation theorists who embrace conventional motivation perspectives such as psychological or social cognitive perspectives view development and change as the individual organism progressing

toward some determinable end point, and context's role is limited to facilitating or inhibiting those developments and changes (Hickey, 1997).

Research on student engagement and school engagement has been conducted since the 1980s in an attempt to understand and enhance student interest, attendance, and achievement, and reduce their boredom, alienation, and drop-out rate (Finn & Zimmer, 2012). Although we still lack a clear and accepted consensus on the definitions and constructs of engagement, as well as its relationships with other terms such as motivation (Appleton et al., 2008; Fredricks et al., 2004), the juxtaposition of diverse definitions of engagement reveals common themes. Researchers have defined engagement as follows: "student's psychological investment in and efforts directed toward learning, understanding, mastering the knowledge, skills or crafts that the academic work is intended to promote" (Newmann et al., 1992, p. 12); "a committed concentration on a task to fulfill a personally relevant goal" (Schallert et al., 1995, p. 119); and "the psychological investment required to comprehend and master knowledge and skills explicitly taught in schools" (Wehlage et al., 1989, p. 17). All these definitions emphasize an inner psychological quality or investment rather than behavioral aspects. Along with psychological or more socio-cognitive bases, motivation and engagement research have been conducted using dominant achievement theories (King & McInerney, 2016). Specifically, motivation and engagement researchers have explored how attribution, expectancy-value, self-determination, achievement goal, and self-efficacy theories affect engagement and how those theories can be used to enhance engagement.

Beyond focusing on engagement in literary works as discussed above and based on motivation and engagement theories in psychology (e.g., Wigfield & Eccles, 2002),

reading researchers have attempted to define reading engagement or define the engaged reader. In particular, the definitions provided by Guthrie and his colleagues (e.g., Guthrie, 1996; Guthrie & Wigfield, 2000; Guthrie et al., 2012) are frequently used in many studies on reading engagement (Lee & Van Deventer, 2019). According to Guthrie's research, reading engagement is defined as the motivated use of strategies for reading (Guthrie, 1996) and as "interacting with text in ways that are both strategic and motivated" (Guthrie et al., 2012, p. 602). These definitions emphasize that readers who are engaged in reading are in a status of high cognitive and motivational demand. Other studies have also suggested similar definitions and characteristics of engaged reading or readers as shown Table 2.3.

Table 2.3 Definitions or Characteristics of Engaged Reading or Reader

Researchers	**Definitions or Characteristics of Engaged Reading or Reader**
Alvermann & Guthrie (1993)	Engaged readers acquire the competencies and motivations to read for diverse purposes, such as gaining knowledge, performing a task, interpreting an author's perspective, sharing reactions to stories and informational text, escaping into the literary world, or taking social and political action in response to what is read. Highly engaged readers are motivated, knowledgeable, and socially interactive (p. 2).
Gambrell (2011)	[Engaged readers are] intrinsically motivated to read for a variety of personal goals, strategic in their reading behaviors, knowledgeable in their construction of new understandings from text, and socially interactive about the reading of text (pp. 172-173).

Guthrie et al. (2012)	[Engaged readers are] motivated to read, strategic in their approaches to comprehending what they read, knowledgeable in their construction of meaning from text, and socially interactive while reading. (p. 602).
Guthrie & Klauda (2014)	Engaged readers are strategic, using cognitive tools such as concept mapping to organize text-based knowledge, and they socially share the knowledge construction process and products with classmates and other audiences (p. 388).
Guthrie et al. (2013)	We refer to reading engagement in its behavioral form, consisting of actions and intentions to interact with text for the purposes of understanding and learning (p. 9).
Ivey & Johnston (2018)	By engaged reading, we mean more than just liking a book or getting through it. Students engaged in reading, entered the social worlds of the narratives, and took up the perspectives of the characters, negotiating the problems they encountered, weighing difficult decisions, and experiencing characters' emotional-relational lives and the consequences of their decisions. (p. 144)

As shown above, many definitions or characteristics of engaged reading or engaged readers are based on the work of Guthrie and his colleagues. Although they were not included in Table 2.3, many other researchers also use Guthrie and his colleagues' studies to define or clarify reading engagement or engaged readers' characteristics. Based on these definitions and characteristics, when readers are engaged in reading, they are expected to process effectively when reading texts for personal and social purposes.

Researchers view reading engagement as the fusion of cognitive and motivational processes. Although researchers have argued that reading is based more on socio-cognitive or psychological processes, recently many researchers have argued that reading

is also affected by sociocultural norms or rules. From the emphasis on contextual or social influences, researchers also pay attention to motivation/engagement and socio-cultural contexts (e.g., King & McInerney, 2016). Thus, researchers seem to broaden their perspectives of reading engagement by including social or contextual elements, as discussed in more detail in the next section.

From the definitions and characteristics of engagement, one thing that we may still speculate about is whether engaged readers are always strategic and social and in turn their success in reading is guaranteed. According to the definitions of engagement, researchers focus more on psychological investment or concentration, but most of the reading engagement definitions postulate that engaged readers use and regulate reading processes efficiently rather than emphasizing readers' effort and commitment. If engagement is viewed as participation, effort, investment, or concentration, it might be disputable about whether reading engagement always involves readers' efficient or effective reading processes or behaviors. Another point of dispute regarding the definitions is how researchers view reading engagement. Specifically, while some may argue that reading engagement means the state of engagement itself, where readers are fully engrossed and immersed in reading, others maintain that reading engagement includes their more persistent and stable efforts, processes, and habits used to reach the state of fully engrossed and immersed reading.

Sociocultural Perspectives

As discussed, conventional achievement motivation theorists (e.g., Wigfield & Eccles, 2002; Eccles & Wigfield, 2002) adopt the individual as their central unit of analysis and thus focus on an individual's thoughts, beliefs, and interpretations of

contexts as they explore and explain their motives (Wigfield et al., 2015). In contrast, researchers who prefer a situative or socio-constructivist/sociocultural view, both of which are relatively new for the understanding of motivation, consider that the traditional individualistic approaches to motivation failed to capture the complexity of motivation. They argue that cognitive activities are context bound and motivation cannot be distinguished from the larger social and sociocultural practices and contexts (Hickey, 1997, 2003; Nolen et al., 2015; Walker et al., 2004).

From these perspectives, Sivan (1986) provided the initial sociocultural analysis of motivation based on Vygotskian ideas. In this article, she maintained that social constructivist theory, which consists of three key elements—namely cognitive activity, cultural knowledge, tools, and signs, and assisted learning, provides a framework for conceptualizing motivation as socially negotiated by the participants in the classroom. Thus, motivation is inseparable from the instructional process and the classroom environment. Sivan also argued that the culturally determined activities between student and social context influence an internal state of interest and cognitive and affective engagement, as well as motivated practices, both of which can be considered cultural norms.

Later, Hickey (2003) also served as a classic source for understanding engagement from a sociocultural perspective.

> A sociocultural view of knowledge supports a unique view of learning. The empiricist and rationalist perspectives supported a relatively clear distinction between “having” and “acquiring” knowledge. The distinction between cognition and learning is not as clear from this more participatory perspective. From this perspective, to engage in learning is to participate in the meaningful use of knowledge. This different view of engagement calls for different models of practice for motivating engagement (p.409).

Hickey pointed out that the conventional behavioral and cognitive view of engagement is based on the distinction between intrinsically and extrinsically motivated activity, arguing that empiricist views regard isolated individuals as the primary unit of analysis. He therefore insisted on the need to consider the relationship between motivation and broader sociocultural contexts in order to better understand students' engagement.

Specifically, Hickey compared researchers' perspectives on engagement in the light of several very different world views and epistemologies. According to his classification, by adopting a mechanistic worldview and empiricist epistemology, researchers view learning as being like a machine and knowledge is acquired by the sensory organs detecting stimuli in the external world. In this perspective, engagement is defined as "participating in whatever routines of activity cause the organism to construct and strengthen particular associations" (p. 406). In contrast, researchers espousing organismic worldviews and rationalist epistemology argue that learning is possible because people are developing organisms. They maintain that knowledge is located in the minds of individuals and is a byproduct of cognitive processes. From this perspective, engagement refers to "being engaged in making sense of new information in the environment (p. 406)". Finally, those embracing contextualist worldviews and sociocultural epistemology focus on "[a] historical event, something that cannot be understood outside the context in which it occurred and the context from which the event is being considered" (p. 407).

Based on theoretical concepts such as *communities of practice* (Wenger, 1998) and *coregulated learning* (McCaslin & Good, 1996), Hickey instead advocated for a

focus on a sociocultural view of motivation that encourages engaged participation in knowledge practices, focusing on examining students' constant negotiations in specific learning contexts. From these discussions, he argued that engagement from a sociocultural perspective is "a function of the degree to which participants in knowledgeable activity are attuned to the constraints and affordances of social practices and identity" (p. 411).

Hickey's concept of motivation as engaged participation in practices differs from the other perspectives that see engagement as a function of learners' goals, expectations, values, or a function of contingencies in the environment, all of which are closely related to traditional achievement motivation. As a result, his concept extends beyond a straightforward socio-cognitive perspective and can instead be called a sociocultural perspective of engagement theory. Although Hickey did not focus on specific learning situations such as reading, his arguments are useful in that in literacy education educators or researchers emphasize readers' literacy practices and their engagement in socially and culturally constructed environments and contexts. And all practices are considered as situated.

Raftery et al. (2012) also took a sociocultural position when they argued that parents and schools are salient facilitators of student engagement. Specifically, based on the self-determination theory, they maintained that: parents should have expectations for the value of education in schools, they should encourage their children's initiations and autonomy, and they should advocate for structures that allow for autonomy. In terms of roles of schools, they noted that teacher beliefs and school interventions can increase family involvement. Lam et al. (2012) also demonstrated that student engagement is

affected and supported by diverse contextual factors. In particular, they focused on contexts including relationships with teachers, parents, and peers. An analysis of junior high and secondary school students' responses revealed that students were engaged in learning when they felt that their teachers adopted motivating instructional practices and they had social-emotional support from their teachers, parents, and peers. These studies imply that students' reading engagement will be affected or supported by social or socio-cultural contexts such as schools and families.

These sociocultural perspectives for motivation and engagement are categorized in more detail by several sub-approaches such as the sociocultural Vygotskian, sociocultural discourse, and situative approaches, all of which are influenced by the Vygotskian tradition (Walker et al., 2010). The researchers from these perspectives attempt to explore and explain how individuals' motivation are socially constructed and how their motivation emerges and develops from social interactions and are manifested in individual, collaborative, or cultural actions. In addition, researchers espousing the sociocultural perspectives agree that students' identities, which are formed in social and cultural contexts and practices, are closely related to their motivation and engagement (e.g., Hickey, 2003; McCaslin, 2009).

For example, Nolen et al. (2015) described in-depth a situative approach to studying motivation to learn in social contexts. They suggested *learners-in-context* as the expanded unit of analysis, with positionality and identity also considered important because individuals' motivations can differ from how they position and negotiate their identities, depending on the particular time, place, and social position. In other words, students' socially negotiated and constructed identities in different contexts shape the

nature of their motivation and engagement in learning, and thus motives, identities, and learning are irreducibly co-constituted. Studies investigating the relationship between motivation and identity based on the sociocultural perspective will be reviewed in more detail later in the section on the critical and sociocultural dimension.

More broadly, King and McInerney (2016) studied how cultures can affect student motivation and engagement. They first reviewed cross-cultural studies based on attribution, expectancy-value, self-determination, achievement goal, and personal investment theories. After that, they suggested the concept of *cultural imagination* to address the shortcoming of knowledge on how cultures influence motivational processes, which refers to "a way of thinking about psychological processes and phenomenon in a culturally nuanced manner (p. 288). They proposed several ways to cultivate a cultural imagination. First, they contended that studies empirically linking the observed cross-cultural differences with the specific cultural sources should be conducted. Second, other sources of cross-cultural variability beyond individualism-collectivism, such as power distance, time orientation, and masculinity-femininity, should be examined. Third, bottom-up approaches drawing on indigenous psychological methods, aside from a top-down approach that theories from the West should be investigated for their validity in non-Western environments. Fourth, the scope of culture should be expanded beyond the national or ethnic group by including religion, socioeconomic status, and regional variability. Finally, they emphasized that researchers need to be more attentive to measurement issues that occur when researchers rely on Western-based measures.

Affective Perspectives

In spite of its importance, research on affect and emotion has largely been neglected in education and literacy, except for a few special cases such as test anxiety (Pekrun, 2016). However, emotions are ubiquitous in every academic setting and influence both students' academic engagement and their achievement (Cook et al., 2020; Pekrun & Linnenbrink-Garcia, 2012). Of course, affect and emotion, which are inherently complex constructs, are defined differently by researchers and are sometimes even used interchangeably. In particular, while affect is often used to indicate a broad variety of noncognitive constructs, including motivation and self-concept, as well as emotion in the educational literature, in emotion research affect specifically refers to emotions and moods (Pekrun & Linnenbrink-Garcia, 2012).

One of the critical issues in defining affect is the distinction between affective traits and affective states, which also involves the issue of the relationship between affect and emotion. Following Rosenberg (1998), whose work is widely cited in research on affect or emotion, affect can be thought of in terms of state and traits. Affective traits refer to "stable predispositions toward certain types of emotional responding" (Rosenberg, 1998, p. 249). In contrast, affective states consist of moods and emotions, with emotions being "acute, intense, and typically brief psychophysiological changes that result from a response to a meaningful situation in one's environment" (Rosenberg, 1998, p. 250). These affective traits establish the threshold for the occurrence of particular affective states. As these definitions show, trait-like affect is relatively stable over time while state-like affect (especially, emotions) reflects a response to changing environments and is thus based on the situation rather than on personality differences or personal tendencies, which are more stable. According to Rosenberg, the relationships

among affective traits, moods, and emotions are hierarchical due to aspects such as simple duration, pervasiveness in consciousness, and distributive breadth, so moods have intermediate attributes between affective traits and emotions.

Shuman and Scherer (2014) viewed emotion as a multifaceted phenomenon involving sets of coordinated psychological processes, including affective, cognitive, physiological, motivational, and expressive components. While this definition focuses more on an individual's inner processes at least according to the definition itself, other definitions of emotion pay attention to contexts. For example, Schutz et al.'s (2006) viewed emotions as being formed in social-historical contexts rather than simply being formed between tasks and individuals. Agreeing on the distinction between moods and emotions, they defined emotion as "socially constructed, personally enacted ways of being that emerge from conscious and/or unconscious judgements regarding perceived successes at attaining goals or maintaining standards of beliefs during transactions as part of social-historical contexts" (2006, p. 344). They specifically supported their definition based on the following notions: emotional experiences involve person-environmental transactions rather than existing as exclusive features; emotional experiences include psychological, physiological, and behavioral aspects; emotions begin with judgements relevant to goals, standards or individuals' perceptions of the processes by a goal pursuit; and the nature of goals and emotions are affected by their particular social, historical, or cultural contexts.

As exemplified above, researchers have different perspectives on definitions, levels, and constructs of affect or emotion. Nevertheless, there are some widely agreed upon ideas in the research on affect and emotion. First, emotions are generated by

appraisal processes (Pekrun, 2016; Schutz et al., 2006). This means individuals experience their emotions through the self-related and situational appraisals that they make with respect to particular events, and so these appraisals function primarily as proximal determinants of human emotions. These appraisals can be regarded as important factors in an educational context because they may mediate the impact of situational factors and so educational interventions can target them to foster students' positive emotional development. In particular, students' judgement of how well their learning processes are going can be related to self-efficacy.

Second, affect or emotion has notable relationships with other components of students' learning such as motivation, cognition, goals, and engagement (Pekrun, 2016). Emotions formed by appraisal processes are known to affect motivation and cognitive strategies for learning (Schutz et al., 2006). However, a positive emotion does not always guarantee a positive relation to other factors. For example, even if students have positive emotions, these emotions could not only deactivate any immediate motivation to continue academic work but also reinforce their motivation for the next stage of learning, depending on which positive emotion students have (Pekrun et al., 2002).

Linnenbrink (2007) argued that affect is related to motivation and engagement. After reviewing existing studies, she proposed a mediational model linking motivation, affect, and engagement. According to this model, achievement goal orientation, which is a proxy for motivation, affects individuals' affect, which in turn influences engagement so affect functions as a mediator between motivation and engagement. However, she pointed out that although unpleasant affect is negatively related to behavioral engagement, it is not always expected to operate negatively to cognitive engagement. In

terms of pleasant affect, she also maintained that pleasant affect is expected to influence both behavioral and cognitive engagement positively but, again, this is not always consistent. Similarly, Pekrun and Linnenbrink-Garcia (2012) discussed the impact of emotions on students' engagement. In their model, engagement is distinguished by five types of engagement: cognitive, motivational, behavioral, cognitive-behavioral, and social-behavioral. Interestingly, they considered emotional engagement to be an antecedent of other components of engagement, while many engagement studies treat affective or emotional engagement as a direct sub-dimension of engagement.

Third, emotions are significantly related to students' academic achievement (Pekrun et al., 2002; Pekrun & Linnenbrink-Garcia, 2012). For instance, Pekrun et al. (2017) tested a reciprocal effects model linking emotion and achievement in their five-year longitudinal research project in mathematics. Based on structural equation modeling, they demonstrated that positive emotions positively predicted subsequent achievement, and achievement positively predicted these emotions. As expected, negative emotions and negative achievement were related to each other. This study revealed that the relationship between emotions and achievement should be emphasized consistently rather than focusing on individual task events.

As the above review has shown, the research on affect and emotion tends to confirm the role of affect or emotions as mediators or an antecedent for students' engagement rather than as a sub-dimension of engagement itself. However, the research on engagement views affective or emotional engagement as one of engagement dimensions (e.g., Finn & Zimmer, 2012; Fredricks et al., 2004; Reeve, 2012; Willms, 2003). For example, Finn and Zimmer (2012) defined affective engagement as "a level of

emotional response characterized by feelings of involvement in school as a place and a set of activities worth pursuing" (p. 103), while Fredricks et al. (2004) argued that the emotional engagement refers to "students' affective reactions in the classroom, including interest, boredom, happiness, sadness, and anxiety" (p. 63).

Although there is a dearth of studies on affect or emotions in reading, several studies have attempted to explore those affective or emotional aspects in literacy. For example, Triplett (2004) explored a student's emotions in the tutoring context. More recently, Lenters (2016) examined the multimodal literacy practices of 11-year-old students using assemblage theory and a socio-material perspective focusing on the role of affect and the body, while Ehret et al. (2018) explored the role of affect in adolescents' online literacies. These recent studies show the influence of affect in multimodal literacy practices.

However, it is difficult to find studies focusing on affect or emotions that are specifically relevant to motivation or engagement in reading. Fortunately, a few studies have explored those aspects. For instance, Gaskins (1996) investigated the effects of issue-related emotional involvement on readers' interpretation of texts related to that issue, defining emotional involvement as "the degree to which one might potentially become emotionally aroused when attending to that particular issue" (p. 389). The results suggest that readers' emotional involvement with the issue in the text influences their comprehension of that text. However, this study differs somewhat from other emotional or engagement research in that it focused on the reader's emotional reaction to the text content itself.

Barber et al. (2016) focused on behavioral aspects to measure cognitive and affective engagement in reading because they are primarily internal states that cannot be measured directly. Their rubric for coding students' affective and cognitive engagement was based on one developed by Lutz et al. (2006) and Parsons et al. (2015) that measures affective engagement by focusing on specific tone, body language, and social aspects.

Dimensions of Engagement in Reading

Many reading researchers share the view that reading engagement is multi-dimensional (Alexander, 2018). Ironically, there are few studies shedding light on engagement components compared to the extensive research devoted to specifying motivation constructs. Guthrie et al. (2012) and Unrau and Quirk (2014) suggest affective (or emotional), behavioral, and cognitive engagement as dimensions for reading engagement based on Fredricks et al.'s (2004) categorization. Although researchers have proposed sub-dimensions of reading engagement based on the existing engagement research, there have been few studies examining why these particular dimensions are vital for reading. For example, Unrau and Quirk (2014), and Guthrie et al. (2012) focused on behavioral, cognitive, and affective/emotional engagement as dimensions of reading engagement, but some researchers showed the possible involvement of social engagement as reviewed below.

Cognitive Engagement

Cognitive engagement is "the expenditure of thoughtful energy needed to comprehend complex ideas in order to go beyond the minimal requirement" (Finn & Zimmer, 2012, p. 102) or can be more broadly defined as the students' level of investment in learning (Fredricks et al., 2011). It includes being thoughtful and

purposeful in reading and being willing to exert the effort necessary to comprehend texts. The measures of cognitive engagement in reading focus on the students' endorsement of a mastery of goal orientation or their metacognition and strategy use. In most cases, interviewing readers or sophisticated survey questions can help understand their cognitive engagement.

Affective Engagement

Affective engagement involves emotions and feelings that lead a student to be engaged in an activity, task, or experience and it involves favorable or unfavorable emotional reactions from an activity, place, or situation (Cook et al., 2020). Positive affective engagement provides the incentives for students to participate in learning and school and provides motivation for the investment of energy (Cook et al., 2020; Finn & Zimmer, 2012). Sometimes, emotional engagement is an interchangeable term with affective engagement; it is difficult to distinguish from motivation since emotional engagement and affective engagement can overlap (Unrau & Quirk, 2014). Similar to cognitive engagement, affective engagement can only be determined or assessed with indirect measures because it is not easy to assess the readers' internal states directly. Thus, interviewing readers or using questionnaires about their reading processes can be helpful in measuring their affective/emotional engagement. Many researchers tend to regard reading motivation as a substitute for affective/emotional aspects, and thus they use existing reading motivation questionnaires (e.g., McElhone, 2012).

Behavioral Engagement

Typically, behavioral engagement includes actions related directly to the learning process in school-related activities, but it can include participation and involvement in

class or extracurricular activities (King, 2020). In reading, specific indicators of behavioral engagement include the students' report of time spent reading and of effort and persistence, and teachers' observations of students' reading behaviors (Guthrie et al., 2012). Since behavioral engagement focuses on reading time, frequency, or behaviors, compared to cognitive or affective dimensions, behavioral dimension can be captured relatively easily. However, one of the problems with the dimension is that "appearing engaged does not guarantee that a student is actually engaged" (Unrau & Quirk, 2014, p. 266).

Social Engagement

Recently, some scholars have added social engagement to the tripartite conceptualization of school engagement. For example, social engagement can be defined as students' participation and interaction around academic tasks, such as sharing or building ideas, and working with others in classroom discussions (Fredricks et al., 2016). The social engagement is thought to moderate the relationship between academic engagement and achievement, mostly because low social engagement may interfere with learning (Finn & Zimmer, 2012). In literacy, social engagement encompasses not only the exchange of interpretations of texts with peers in literacy classrooms but also appropriate interactions with teachers and peers and following implicit and explicit classroom rules of behavior (Lutz et al., 2006). Ivey and Johnston also focused on social aspects of and for reading engagement (e.g., Ivey, 2014; Ivey & Johnston, 2013). For example, they demonstrated the social nature of literacy and human development. Their analysis of student interview data led them to conclude that social activity "[occurs] inside books in the form of dialogical relationships with characters and outside of books

in dialogical relationships with others and with selves" (Ivey & Johnston, 2013, p. 271). This work thus emphasized its importance for engaged reading and posited that transaction rather than interaction explained dialogical relationship.

The Relation Between Reading Motivation and Engagement

Although engagement research has increased recently, its distinction from motivation remains subject to debate. Some researchers conceptualized that motivation is thought of in terms of the direction, intensity, and quality of one's energies, and engagement is described as energy in action (Appleton et al., 2008). However, the relationship between these terms is still unclear and there are thorny problems involved in distinguishing between them (Eccles & Wang, 2012). For instance, some researchers use the terms motivation and engagement interchangeably, while others propose that the constructs of engagement subsume motivation, and yet others argue that both terms are distinct, with motivation representing intention and engagement action (Reschly & Christenson, 2012).

In particular, this ambiguity is noticeable with regard to the subdimensions of engagement. For example, Cleary and Zimmerman (2012) focused on cognitive engagement encompassing strategies and regulatory processes, positioning self-efficacy as a form of motivation leading to cognitive self-regulatory activities, but Pekrun and Linnenbrink-Garcia (2012) included motivation as a component of their engagement model by extending the existing cognitive, affective, and behavioral engagement framework. This ambiguous relationship is also apparent when researchers use surveys or questionnaires to measure reading motivation or reading engagement. For example, Loera et al. (2011) used the Motivation for Reading Questionnaire (MRQ), which was

originally developed to measure reading motivation, to instead measure the students' reading engagement. Notably, although the researchers introduced MRQ to measure reading motivation as part of a theoretical framework, they then suggested that the MRQ was designed to measure reading engagement in terms of the methods used. Similarly, Guthrie et al. (2013) used the Motivation for Reading Information Books in School (MRIB-S) questionnaire, which appears to measure motivation, to measure students' reading motivation and reading engagement at the same time by employing different constructs in MRIB-S. These examples may indicate that researchers regard reading motivation and reading engagement as somewhat interchangeable rather than explicitly distinguishable concepts.

Although there are debates about the relationship between reading motivation and reading engagement, reading researchers agree that this reading motivation is crucial for reading engagement. And reading researchers also have tried to clarify the relationship between both terms. Afflerbach and Harrison (2017) maintained that motivation is a mind-set and it is readers' potential energy that leads them to engage with reading, while engagement itself is the readers' kinetic energy. Guthrie and Wigfield (2000) also argued that "motivation is the foundational process for reading engagement and is a major contributor…to disengagement from reading" (p. 405). These statements show researchers' consensus that reading motivation affects reading engagement, but also that their recognition of the relationship between the two terms is not identical. Afflerbach and Harrison (2017) appear to view reading motivation as the intention leading up to the

actual reading engagement, which is action. Guthrie and Wigfield (2000) seem to view reading motivation as subsumed by reading engagement[2].

In order to distinguish between reading motivation and reading engagement, three central questions should be answered: How are reading motivation and engagement defined as constructs?; Is reading motivation a facilitator or indicator of reading engagement?; and Would clarifying the relationship between these terms affect their assessment? (Unrau & Quirk, 2014). While answering those questions, Unrau and Quirk defined reading motivation as "internal processes that instigate and sustain reading activity" (p. 272), arguing that reading motivation does not guarantee or require an individual to read. Similar to Afflerbach and Harrison (2017), they viewed reading engagement as actions (both observable and unobservable). They also viewed reading motivation as a facilitator of reading engagement in that contextual elements, self-beliefs, and intrapersonal factors all affect reading engagement. Finally, when Unrau and Quirk reviewed the existing instruments such as the MRQ(Wigfield & Guthrie, 1995, 1997) and the Reading Engagement Index (Wigfield et al., 2008), they claimed that the instruments implying that engaged readers possess some underlying reading motivation is problematic.

As the above shows, there is still an equivocal relationship between reading motivation and engagement. Research needs to focus on central questions such as identifying the relationship between these two constructs, determining whether reading motivation and reading engagement are separate, and identifying whether a reader can be

[2] This may be supported by their definition of engaged readers, who are "motivated to read, strategic in their approaches to comprehending what they read, knowledgeable in their construction of meaning from text, and socially interactive while reading" (Guthrie et al, 2012, p. 602)

motivated in reading but not actively engaged in reading or have it as a goal. Notwithstanding the commingled relationship, there is a broad agreement that reading motivation underpins reading engagement and that reading motivation is a basis for subsequent reading engagement. The existence of this relationship is verified by many studies.

For example, De Naeghel et al. (2012) sought to clarify the relation among reading motivation, reading self-concept, reading behavior (which they considered to be equivalent to reading engagement), and reading performance. They measured students' reading motivation using the Self-Regulation Questionnaire-Reading Motivation which is based on self-determination theory (e.g., Deci & Ryan, 2000). Analyzing the results obtained using structural equation modeling, they demonstrated that while recreational autonomous motivation predicts reading engagement, academic autonomous motivation does not. Similarly, Klauda and Guthrie (2015) examined the development of reading motivation, engagement, and achievement in early adolescence in a longitudinal study. After using constructs of the MRIB-Q to measure reading motivation and engagement, they found that motivation predicted concurrent engagement and growth in engagement. Interestingly, both of these studies captured students' reading engagement in terms of their observable behavior. This suggests that these researchers agreed with the notion that motivation represents intention and engagement is action.

Strategic Engagement

The SE framework was introduced by O'Brien and Dillon (2014). In this section, the overview and dimensions of SE are discussed. In particular, for the dimensions of SE, some representative achievement theories and relevant literature are reviewed.

Overview of Strategic Engagement

As discussed earlier, SE was introduced by O'Brien and Dillon (2014) to demonstrate that engagement can be explicitly taught, modeled, practiced with guidance, and then independently used, just as educators have been doing with cognitively based comprehension strategies for the last 35 years or so. Literacy educators and classroom teachers now routinely teach their students how to connect ideas to their background knowledge, monitor their comprehension, use fix-up strategies when they need them, and self-assess their success. I contend that explicit instruction focusing on the motivational aspects of engagement can be equally successful. For example, SE can include taking a stance toward a topic (as explored in both print and multimodal text) that promotes personally relevant goals, emotional connections, and allows learners to assign value to learning about a topic. Once these components are made explicit, students can be taught to strategically monitor their own use of these strategies to support self-regulation, with the end goal of improving their experience of using multimodal texts to develop understanding.

The SE framework emphasizes the parallel importance of cognitive strategies and motivation during reading. Thus, strategically engaged readers are expected to use appropriate strategies to simultaneously monitor, control, and foster their cognitive processes and motivational status (see Table 2.4). They should also be aware of their reading goals as valuable and that they are capable of achieving them. Because reading goals and reading value may be reciprocal, readers can set reading goals and then elicit reading value; alternatively, they can self-generate reading value and use it to set reading goals.

Thus, in addition to teaching reading strategies, educators need to help their students set reading goals and internalize reading values, both of which are connected to cognitive and motivational strategies while reading. At the same time, teachers should help students recognize reading goals and reading tasks as feasible. Here, it is important to stress that students are active and subjective agents who can regulate their motivation based on their reading goals. Also, to foster agency in meeting a goal, O'Brien and Dillon (2014) argued that two things must happen: "(1) a strategy must foster deliberate cognitive processing that a reader uses in selecting and monitoring a plan to attain a goal and (2) the reader must be supported in assessing the goal as valuable, the latter being tied to motivation and engagement theory" (p. 48).

Table 2.4 Strategic Engagement: Making Explicit Connections (O'Brien & Dillon, 2014, pp. 48-49)

Current Position on Strategic Reading (Almasi & Fullerton, 2012)	**"Strategic Engagement" Emphasis—Making the Engagement and Motivation Explicit**
The reader should have a goal in mind.	1. Tying the goal to value and expectation for success: Part of the instruction should explicitly focus on clearly defining the goal—for example, Goal = You will read to make three inferences about the passage. 2. Clearly defining the value of the goal—for example, if you can draw inferences, you can better understand the text and make connections to your experiences, which makes the reading more meaningful. 3. Discussing explicitly reasons that the goal is attainable and within the reader's scope of experience

	and ability (remember to define ability as open and within one's control).
The reader should plan actions to meet the goal.	**Presenting contingencies and choices**: 1. Teachers should discuss with readers how possible plans might be effective; readers should be allowed to choose actions they prefer to meet the goal, reassess, and try new plans. 2. You should focus, via interacting with students, on the autonomy and control associated with choosing from contingencies. For example, students might read and jot down possible inferences as they go; they could wait until the end of a section of text and jot down a main inference; or they could read the whole text and then jot down three things that they know for sure (explicit information) and three things that they are pretty sure are inferences that could be drawn.
The reader is motivated to actually enact the strategic actions.	**Reviewing/reinforcing**: By this step, the reader is already moving toward motivation. But this is a good point for a reminder—that the goal is clear and valuable; the reader is reminded that she/he has formulated a plan and chosen strategies that are expected to work and that readers have control over.
The reader has the ability to monitor the process to see whether he/she has attained the goal and to make adjustments as necessary.	**Explicitly tie monitoring to "online" agency and recursive agency**: Monitoring is attention to whether the chosen actions are working strategically toward meeting the goal and include a stance of control. As a reader, I have options if this is not working and it is my choice to pick action B. If at the end of the reading, I assess that I did not meet the goal, it is my choice to start over with a new plan.

Example: This could be applied to instructional routines leading to strategic reading—for example, one could modify list–group–label or SQ3R so that the specific strategic components are aligned with motivation and engagement components.

When discussing the terms *strategy* and *strategic*, reading researchers tend to focus on their cognitive aspects. For example, strategy is defined as "a mental routine or procedure for accomplishing a cognitive goal" (Dole et al., 2009, p. 348) or "a strategy is composed of cognitive operations over and above the processes that are natural consequences of carrying out the task … (strategies) achieve cognitive purposes … and are potentially conscious and controllable activities" (Pressley, Forrest-Pressley, Elliott-Faust, & Miller, 1985, p. 4). In addition, reading strategies, which are also based on cognitive aspects, refer to "deliberate goal-directed attempts to control and modify the reader's effort to decode text, understand the words, and construct meaning of text" (Afflerbach, Pearson, & Paris, 2008, p. 368).

However, given that there are both socio-cognitive and socio-cultural perspectives for learning (e.g., O'Brien & Rogers, 2015; Engeström, 1999; Lave & Wenger, 1991; Zimmerman & Cleary, 2009), the term *strategy* should not be confined to cognitive aspects; rather it should be employed globally to include diverse cognitive, motivational and affective processes since learners can use strategies for both motivational and affective regulation (Garcia & Pintrich, 1994; Miele & Scholer, 2018; Scholer et al. 2018; Wolters, 2003). Although there is general agreement with Alexander, Graham, and Harris (1998)'s argument that strategies have six attributes (procedural, purposeful, effortful, willful, essential, and facilitative), strategies for motivation and affect may also be

covered or mediated by cognitive strategies, and sometimes this is manifested overtly, consciously, and intentionally.

Although it entails monitoring and controlling strategies within and among cognitive and motivational aspects and goals, as already discussed, SE is mainly based on self-efficacy, expectancy-value, and self -regulation theories in addition to strategic comprehension processes in reading. That is, the SE framework is based on some questions that stimulate students' cognitive and motivational status or process (Wigfield & Eccles, 2002; Wigfield et al., 2015): Can I do this activity? Do I want to do this activity, and why? and What do I need to do to succeed? These theories are crucial, as SE begins with helping students recognize whether they can do the reading, whether they want to do the reading and why, and what they need to do to succeed in reading.

Components of Strategic Engagement

Based on the core tenet of SE, SE is largely based on both cognitive and motivational aspects in reading. However, here, the baseline components for SE are discussed in more detail. It should be noted that these components have reciprocal, intertwined and overlapped relationships rather than orthogonal.

Cognitive Processes

As explained above, SE can be more enhanced when stimulating students with the questions of Can I do this activity? Do I want to do this activity, and Why? and What do I need to do to succeed? Among these questions, teaching reading explicitly can be related to the third question.

Reading comprehension research has a long and rich history and so many effective individual and collective strategies for teaching comprehension have been

found. As explained, the SE framework emphasizes even more making explicit and enhancing motivational elements but teaching cognitive processes in reading comprehension should underlie as well. In terms of teaching comprehension strategies, there are two kinds of instructional practices including implicit instruction and explicit instruction (Almasi & Fullerton, 2012). Implicit strategy instruction provides an instructional context or environment in which readers gradually internalize instructional principles through guided scaffolding by more capable or knowledgeable others (Vygotsky, 1978). Thus, teachers plan learning activities by carefully selecting text that requires readers to use specific strategies and to interact with others. Instead of teaching strategies themselves directly, teachers take a more active role in the reading activities by providing hints and prompts to facilitate student scaffolding and learning.

As an example of explicit instruction, Duke and Pearson (2009) suggested effective practices for developing reading comprehension. They suggested an instructional model including the following five components: an explicit description of the strategy and when and how it should be used; teacher and/or student modeling of the strategy in action; collaborative use of the strategy in action; guided practice using the strategy with gradual release of responsibility; and independent use of the strategy. These phases emphasize that teachers need to shift their teaching responsibility gradually to student strategy use responsibility. Of course, good readers are expected to use multiple strategies constantly rather than using only one strategy at a time.

More specifically, teachers teach individual comprehension strategies including prediction, prior knowledge activation, think-aloud, text structure, visual representations, summarization, questions/questioning, and comprehension monitoring (Almasi &

Fullerton, 2012). As effective comprehensive routines mean an integrated set of practices that could be applied regularly to one text after another, reciprocal teaching, transactional strategy instruction, Questioning the Author, the Directed Reading-Thinking Activity, and informed strategies for learning are also used for student comprehension development (Duke & Pearson, 2009).

SE pursues these explicit reading instructions more. As explained, in SE, strategic readers are expected to have a goal in mind, to plan actions to meet the goal, to be motivated to actually enact the strategic actions, and to monitor the process to see whether they have attained the goal and to make adjustments as necessary (Almasi & Fullerton, 2012). Thus, teachers' instructional practices should make teaching reading explicit by focusing on helping students have reading goals, plan explicit actions, and to monitor their reading processes with teaching diverse strategies.

More recently, along with the DL approach which refers to discipline-specific literacy ability or practices in each discipline (Draper & Siebert, 2010; Fang, 2012; Moje, 2015; Shanahan & Shanahan, 2012), students need to be taught with disciplinary comprehension strategies because each text in a discipline is based on a particular interpretive lens that is a characteristic of its field and because each discipline develops different discourse styles and different kinds of texts as a function of the kinds of knowledge they are creating and sharing (Shanahan, 2009). For example, historians use unique processes, such as sourcing, corroboration, and contextualization when analyzing and interpreting multiple historical sources (Wineburg, 1991).

Motivational Processes

As discussed, motivational aspects in SE are relevant to the questions of Can I do this activity and do I want to do this activity, and why? (Wigfield & Eccles, 2002; Wigfield et al., 2015) From these questions, reading efficacy, value, and goal orientation are important.

Self-efficacy/Expectation. Self-efficacy is relevant to the question of *Can I do this?* Self-efficacy is defined as "the conviction that one can successfully execute the behavior required to produce the outcomes" (Bandura, 1977, p. 79), and it affects or contributes to learning, motivation, and self-regulation (Bandura, 1989, 1993). Thus, it is hypothesized that students with higher self-efficacy will be more apt to choose challenging activities, be willing to expend more effort to succeed, and persist longer when attempting difficult tasks.

One important issue is the discrepancy between self-efficacy and actual performance. This is explained by the concept of calibration, which refers to "how well self-efficacy relates to actual performance on the corresponding tasks" (Schunk & Pajares, 2009). For example, when a student judges that she is capable of performing a task and then performs it, or when she judges that she is incapable of performing it and cannot perform it, we can say that she is calibrated well because her self-efficacy accurately predicts her performance. This calibration is educationally important because students who overestimate their capabilities may sometimes fail, lowering their motivation, and so, to avoid this, teachers can provide information about the skills required for the task (Schunk & Pajares, 2009).

Students' expectancies for success and beliefs about ability are often associated with thoughts and actions for doing or improving their reading, for example by

analyzing/setting reading goals, using reading strategies, and monitoring their reading comprehension processes. In turn, their self-efficacy beliefs are influenced by the results of these behaviors (e.g., their achievement or otherwise of the reading task) and their environment (e.g., feedback from their teachers). This competency belief influences readers' cognitive processes in reading. Students' reading skills and their competency beliefs are known to be correlated (e.g., Morgan & Fuchs, 2007), and perceived reading self-efficacy has been shown to predict reading comprehension achievement (e.g., Solheim, 2011).

Teachers who are using the SE framework are expected to use texts of appropriate level corresponding to students' levels. Using an appropriate text can include uses of diverse multimodal texts, in that those texts can help students comprehend. The teachers will also use group discussions as a way to enhance student's reading efficacy because interactions with peers enable students to better understand the text, and the peers can also be a kind of role model for reading competence. In addition, giving immediate and positive feedback (e.g., praise) about students' reading activity or participation can enhance their confidence and self-efficacy.

Task Value. Expectancy-value theory is relevant to the question of *Do I want to do this activity, and why?* This theory is especially important for the SE framework in that the framework emphasizes maintaining and enhancing the value students place on reading. According to Wigfield et al. (2016), subjective value consists of four components. The first, *attainment value*, refers to the importance of doing well on a given task. This incorporates identity issues and is linked to the relevance of engaging in a task for confirming or disconfirming salient aspects of one's self-schema. The second,

intrinsic value, is similar to the construct of intrinsic motivation, interest, and flow, which means the enjoyment gained from doing the task. The third, *utility value or usefulness*, is similar to extrinsic motivation but also relates to an individual's internalized short- and long-term goals. It means how a task fits into an individual's future plan. Finally, *cost* means what the individual has to give up to do a task, which is conceptualized in terms of value because all choices are assumed to have costs associated with them and one choice often eliminates other options.

Students' subjective task values predict intentions and/or actual performance and achievement (Durik et al., 2006; McGeown et al., 2015). In contrast, when students fail to value what they are asked to learn in school, the degree of student motivation to engage in the target learning activity decreases significantly (Wigfield et al., 2009). Students need to recognize the value of reading or the value of their goals in reading by themselves or with support from their teachers (Canning & Harackiewicz, 2015; Jang, 2008; Hulleman et al., 2010).

Studies based on expectancy-value theory have demonstrated that well-designed interventions enhance students' perceptions of reading task value (e.g., Rosenzweig et al., 2018). It appears that students having opportunities to recognize the task value is crucial regardless of who generates the rationale, importance, or usefulness for the task. However, it should be noted that when students generate task value by themselves and when teachers use autonomy-supportive statements instead of using coercive or authoritative statements, students' task value recognition will be enhanced. Thus, teachers from the SE framework are expected to give opportunities or build environments that students can self-generate the reading value of the text. They also can provide

rationales for reading or suggest reading value after students elicit reading value by themselves or when they have difficulty doing it. It should be also noted that teachers can use verbal motivational strategies for enhancing students' reading value by revealing verbally usefulness, importance, enjoyment, and rationale of tasks (Green, 2002).

Goal Orientation. Goals are most commonly defined as "the incentive or outcome a person is trying to achieve" (Maehr & Zusho, 2009, p. 77). These goals involve important symbolic or self-regulatory processes to maintain or instigate actions and motivate people to expend effort to achieve them (Schunk & Usher, 2012), by allowing us to identify how certain behaviors, thoughts, and emotions are linked and function as coordinated systems (Dweck, 1992).

Goal orientation is an integrated pattern of beliefs that leads to "different ways of approaching, engaging in, and responding to achievement situations" (Ames, 1992, p. 261). By themselves, goals do not automatically enhance learning and motivation. Bandura (1997) argued that goals' effects depend on their properties: specificity, proximity, and challenge. Thus, learners consider how specific the goals are, how quickly the task should be done, and which level of task proficiency is required. Because a number of different models of goal orientation have been proposed by different goal theorists, a variety of different concepts or definitions of goal orientation are used. For example, researchers have proposed the concepts of learning and performance goals (e.g., Dweck & Leggett, 1988), mastery and performance goals (e.g., Ames, 1992), and task-oriented goals and performance-involved goals (e.g., Anderman & Midgely, 1997).

However, all of these concepts seem to deal with similar constructs, and there is general agreement that learning goals means increasing and developing one's competence

and understanding from learning, and performance goals involve outperforming others as a means to gain favorable judgements of one's ability or competence (Anderman et al., 2002; Covington, 2000). Related to personality, Dweck and Leggett (1988) suggested that students who view ability as something malleable and incremental that can be improved over time would be more likely to adopt mastery goals whereas students with low perceptions of competence who typically view intelligence as fixed and innate would be more likely to endorse performance goals. Researchers generally agree that learning goals demonstrate positive educational outcomes such as deep cognitive strategies and retrieving prior knowledge, but for performance goals, the results are less consistent.

Although most studies are based on two approach tendencies, one focused on learning and understanding (learning goal) and the other focused on the maintenance of favorable judgments (performance goal), some studies assume three-goal or four-goal models which demarcate clearly between approach and avoidance forms of motivation. Specifically, there may be four achievement goals such as mastery-avoidance goals, mastery-avoidance goals, performance-approach goals, and performance-avoidance goals. However, the mastery-avoidance goal construct is the least accepted, and thus the majority of researchers have seemingly embraced the trichotomous goal framework (Maehr & Zusho, 2009). Elliot and Harackiewicz (1996) proposed empirically independent approach and avoidance motivational orientations in performance goals and demonstrated that performance goals that were solely grounded in the avoidance of failure undermined intrinsic motivation.

Teachers who pursue the SE framework are expected to help students establish the mastery reading goal orientation more than the performance reading goal orientation.

To do that, when teachers help students self-set their reading goals or when they provide assigned reading goals to students, they need to emphasize the learning itself through reading the texts or the expected value from reading the texts rather than having students focus on grades, social comparison or competition. Providing a challenging reading activity that requires collaboration with peers can also be one of the options to enhance students' mastery-approach goal orientation.

Self-regulation

Self-regulation is relevant to the question of *What do I need to do to succeed*? Self-regulation refers to "self-generated thoughts, feelings, and actions that are systematically designed to affect one's learning of knowledge and skills" (Schunk & Zimmerman, 2007, p. 8). Self-regulation, as more than a cognitive process, is important for individuals if they are to be engaged strategically before, during, and after learning performance (Cleary & Zimmerman, 2012). A great deal of research has demonstrated that students' efforts to stay focused on a learning task during the learning process are based on their self-regulation system at the level of volitional strategies (Boekaerts, 2007). Self-regulation is thus a useful concept with which to explore readers' strategic and spontaneous mental and affective processes.

There are many components involved in self-regulation processes, but a key variable is goal setting because it extends across all the different phases of self-regulation (Locke & Latham, 2002) and "facilitates self-regulation in that the goal defines for the person what constitutes an acceptable level of performance" (Latham & Locke, 1991, p. 234). Goals direct attention and effort toward goal-relevant strategies and activities and away from goal-irrelevant activities, regulate individuals' efforts, affect persistence and

monitoring of goal progress, and are strongly related to subsequent performances (Latham & Locke, 1991; Locke & Latham, 2006; Schunk, 2001). Also, goal commitment is facilitated when people recognize the goal attainment as important and they believe that they can attain the goal (Locke & Latham, 2002).

Goal setting can lead to student motivation and higher academic achievement either by assigning goals by teachers or by allowing students to set their goals (Latham et al., 1988; Latham & Locke, 1991; Schunk, 2001). As already reviewed in the Achievement Goal Theory section above, goals should incorporate specific performance standards and be determined by how far they project into the future and by how difficult attaining the goals is (Schunk, 2001). It should be also noted that readers' goals for reading can affect comprehension processes such as inference generation, strategy use for integrating information from texts, and reading time (van den Broek et al., 2011).

From the viewpoint of self-regulation in reading or self-regulated reading, readers must first set their own reading goals, then recognize their reading efficacy, and plan how to achieve the goals they have set by considering the text characteristics. During reading, they must be persistent in attaining their self-set goals for understanding the text by monitoring and controlling their cognitive processes and motivational statuses with constant feedback. Afterwards, readers judge whether their performance during reading has satisfied their goals by using self-evaluations of comprehension and asking themselves review questions to ensure understanding. This judgement can, in turn, affect the initial phase again. Goal setting thus represents a crucial part of self-regulated reading.

Beyond focusing on cognitive aspects in self-regulation, it is necessary to pay attention to self-regulation of motivation, as motivation is mutable, changing moment by moment (Guthrie & Wigfield, 2000; Unrau & Quirk, 2014). Many leading motivation studies capture readers' motivation at a moment in time rather than continually tracking it or checking several times during a reading task. Readers will regulate their changeable motivational statuses or beliefs as they read in pursuit of their reading goals or achievements, so it is necessary to examine how students identify, address, and regulate their dynamic motivation during learning tasks (Miele & Scholer, 2018; Scholer et al., 2018). Thus, readers should know how different motivational states will affect the performance of specific tasks and understand that the type, amount, and motivational strategies required for the best goal outcomes may operate differently in each context, rather than exerting similar effects across tasks and contexts.

Based on the self-regulation theories, teachers who follow the SE framework will focus more on helping students set their reading goals or assigning reading goals, providing rationale or purpose of the reading goals and texts. Also, they will recognize students as agentic readers who regulate their motivational statuses and orientations to achieve reading goals with reading value and will emphasize the relationship between reading goals and reading value to enhance students' goal-oriented motivational regulation. After the reading, the teachers will be able to lead students to self-evaluating their reading processes including cognitive and motivational aspects.

Summary of Strategic Engagement

As discussed, engaged readers are expected to monitor and regulate concurrently their cognitive and motivational (or affective) processes, so educators should make

motivational elements explicit in their classes as well as teaching cognitive reading strategies to engage students in reading. The SE framework is based on some achievement motivation theories including self-efficacy, expectancy-value, goal, and self-regulation theories. Among those theories, expectancy-value and self-regulation theories are viewed as more important because self-regulation is regarded as a crucial mental process to set, monitor, and regulate goals and strategies in cognition and motivation, and reading value enables readers to realize reading as meaningful and in turn to be involved in reading activities. A figure suggesting the core components of the SE framework is shown below (Figure 2.1). The model represents the reciprocal and intertwined feedback among the core components.

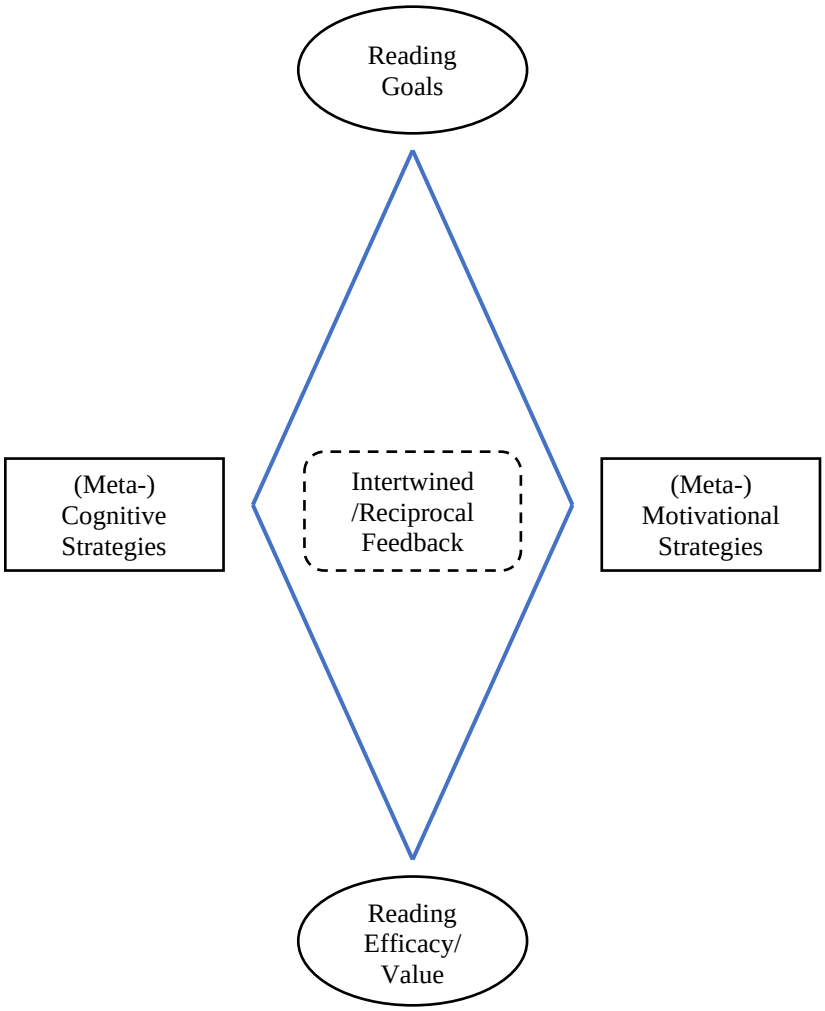

Figure 2.1 Core Components of Strategic Engagement Framework

Specifically, it was discussed that with emphasis on strategic reading processes, teachers should present, clarify reading goals or help students set their reading goals by themselves. In addition to teaching cognitive strategies, teachers should help students recognize the value of reading by assigning a task that leads students to think of reading value, by raising some questions that stimulate students' recognition of reading value, or by presenting verbally usefulness, importance, and enjoyment of reading tasks. Through the harmonized instructional practices of these teaching elements, teachers can help

students monitor and regulate their motivation to achieve reading tasks even if they find them challenging during reading.

Of course, it should be also noted that as to the term text accessibility, strategically engaged readers may make texts accessible by selecting or transforming what they read, and at the same time, teachers need to make texts available in order to enhance students' engagement in reading by considering text readability and student interest (O'Brien & Dillon, 2014). Additionally, as already discussed, we need to note that reading engagement is social and readers' engagement influences or is influenced by interactions with others and socio-cultural contexts (Ivey, 2014; Ivey & Johnston, 2013). Furthermore, students with their own agency are situated in learning contexts and their positionalities and identities which are negotiated and constructed in the contexts should be considered for student reading engagement (Hickey, 2003; Nolen et al., 2015). These mean that to support students' cognitive and motivational/affective engagement in reading teachers should consider social and critical aspects in class as well. This can lead to the instructional SE components as shown below.

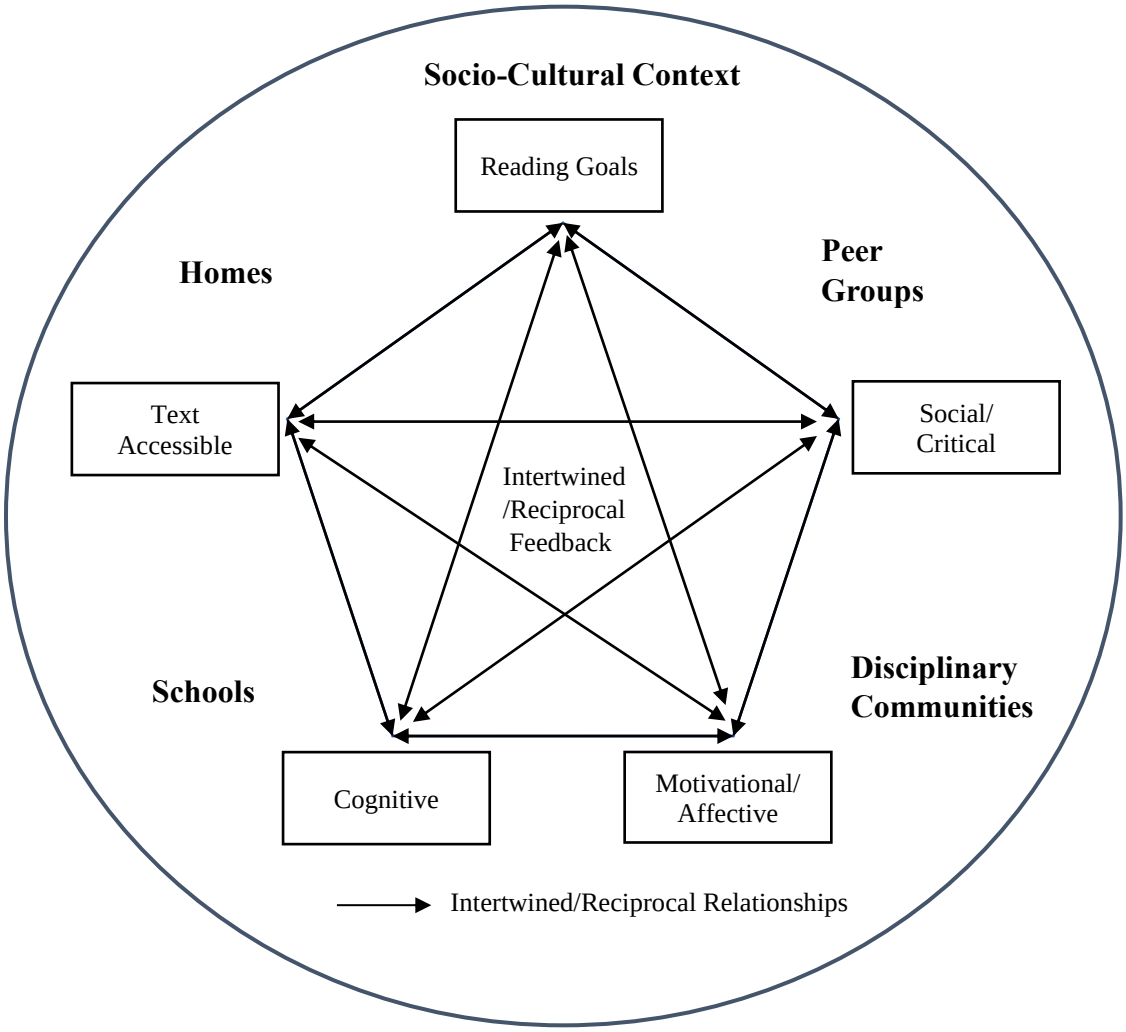

Figure 2.2 Components of Instructional Strategic Engagement Framework

Summary

In this chapter, first, how DL has been defined and studied. Specifically, it was reviewed that DL studies are based on a range of academic perspectives and they affect teachers' instructional beliefs or stances. Second, reading engagement was discussed. Reading engagement can be discussed by psychological, socio-cognitive, socio-cultural and affective perspectives. Also, many researchers agree that reading engagement is multidimensional and it can have four dimensions of cognitive, affective, behavioral, and

social dimensions. The relationship between motivation and engagement was discussed as well. Finally, SE was discussed. SE emphasizes the parallel importance of cognitive and motivational aspects in reading, based on the theories of self-efficacy, expectancy-value, goal, and self-regulation. Thus, it was suggested that teachers from the SE perspective should focus on teaching (meta-)cognitive and motivational strategies with emphasis on reading goals, value, and efficacy. At the same time, it is encouraged that teachers need to consider text accessibility and social and critical aspects in reading.

CHAPTER 3: SOCIAL STUDIES TEACHERS' PERSPECTIVES WHEN INCORPORATING DISCIPLINARY LITERACY INTO THEIR TEACHING

Recently, theoretical and empirical research on disciplinary literacy (DL) has expanded from the early research on content area literacy (e.g. Alvermann & Moore, 1991; O'Brien, Stewart, & Moje, 1995) to examine the literacy practices within each discipline (Moje, 2008, 2015; Shanahan & Shanahan, 2008). Under the content literacy approach, studies shed light on researchers' attempts to change teachers' beliefs, especially preservice teacher candidates; but in the DL era, starting in the mid-2000s, researchers started to explore practicing teachers' perspectives on literacy generated from within the disciplines. This study fits within that new emphasis, with a particular focus on teachers' evolving perceptions of DL from collaborating with researchers over time and based on collaborative discourse in planning meetings over a two-year period.

Guiding Questions

The broad goal of the study was to collaborate with high school social studies teachers interested in incorporating disciplinary literacy approaches to support a diversity of students in an International Baccalaureate (IB) program. These questions guided this portion of the research:

What perspectives do social studies teachers hold when incorporating disciplinary literacy into their teaching as evidenced by discourse in collaborative planning? More specifically,

- How does teacher discourse in collaborative planning sessions evidence the understanding of and importance of teaching disciplinary literacy in learning?

- How does teacher discourse in collaborative planning sessions evidence the understanding of and importance of motivation and engagement in disciplinary teaching and student learning?

Background of the Study

This study was conducted as part of a larger five-year project that took place in a public high school of a midsized urban city in the Midwestern region of the US. The larger project, the Frederick Douglass Project (project label is a pseudonym), was designed to validate components of a multidimensional DL framework and to support high school students and their teachers in implementing the framework. The project was based on collaboration among social studies teachers, literacy researchers, and social studies education researchers. This school is staffed by approximately 100 faculty members and attended by approximately 1100 students. The school has a long history of excellence in (IB) programs, is an IB Certified Diploma Programme, and also certified as an IB Middle Years Programme school.

Methods

Participants

The participants in this study are three social studies teachers; one male, Michael, and two females, Catherine and Dawn (all pseudonyms), each with over a decade of classroom teaching experience. Since the teachers had previously collaborated with researchers for several years, they had an understanding of the purpose of the study and scope of the project, as well as their roles in DL teaching and applications of DL.

Specifically, Catherine had been teaching history for 20 years, and at the time of data collection, she taught an eleventh grade *World Topics* course, which was the first

year in a two-year IB course sequence. As the most senior teacher, she was an articulate and outspoken member of the collaborative. Catherine was equally excited by her students and her course content. Catherine foregrounded content, creating her curriculum in response to the IB standards and textbook. She assigned dense texts to her students for homework, and often in-class reading was completed individually and silently. Catherine focused on traditional textbooks, primary source documents, and lecturing to teach the content.

Michael had been teaching history for 15 years and taught a twelfth grade *History of the Americas* class, which was the second year of the IB history course sequence. In the Frederick Douglass Project, Michael explicitly stated that he wanted support from the project. Thus, he asked for help in generating literacy scaffolds such as study guides and graphic organizers to supplement his class content. Michael revealed that students enjoyed history the most when he taught it as a story, and he was flexible in his willingness to adapt lessons. Michael frequently used multimodal texts like movie clips and YouTube videos, in addition to lecturing, to teach content.

Dawn had been teaching history for 14 years, and she taught tenth grade *U.S. History* at the time when the data were collected, which was considered part of the pre-IB curriculum that prepared students to take Catherine and Michael's IB course. Dawn was cognizant of her students' literacy abilities and needs, foregrounding comprehension and historical thinking strategies to create her curriculum. She was eager to understand how DL instruction could be used to enhance her students' comprehension and learning. Dawn was often willing to adapt her lessons or materials if she felt the change would benefit her students. For example, instead of relying on textbooks in her class, she tended

to use primary source material she had tailored to be accessible by shortening pieces, updating antiquated vocabulary, and framing the text with literacy skills and historical thinking prompts. This was because she found that traditional texts overwhelmed students. Generally, her teaching practices followed the notion of text accessibility.

All three teachers valued apprenticing their students in historical thinking, reading like historians, and other DL practices. Catherine, Michael, and Dawn argued that teaching historical thinking is beneficial for students to live in and out of the classroom because historical literacy and thinking skills enable students to enhance critical thinking skills. Since all three teachers maintained that they did not explicitly revisit historical thinking skills and strategies, they tried to share their concerns and challenges; they also were open to receiving feedback or support from the research members by participating actively in the regular collaborative meetings in the project. But they also cited a lack of time to cover all of the given curriculum content.

Data Sources

The main data source is transcripts from whole collaborative meetings which took place during the 2016-2017 school year. All the meetings were audio-recorded and transcribed. Meeting notes, which were written during and shortly after the meetings about participants' conversations, were also reviewed for clarification and confirmation of the meeting transcripts. As a secondary data source, the teachers were also interviewed to better understand their beliefs and perspectives (see Table 3.1).

Table 3.1 Data Information

Data Source	Description
Transcripts from Collaborative Sessions	• The transcript data source was from collaborative meetings which took place during the 2016-2017 school year. • There were 14 meetings of approximately three hours in length that were held every two to three weeks. • These transcripts were analyzed as the main data source.
Meeting Notes	• Meeting notes were written during and shortly after the meetings about participants' conversations. • These notes included some summary points as well as researcher reflections on the sessions. • The notes were reviewed for clarification and confirmation of the meeting transcripts.
Teacher Interviews	• The teachers were interviewed to better understand their beliefs and perspectives. • These interviews, based on a semi-structured interview guide, were conducted for an hour to 90 minutes individually with each teacher. • Interviews included the questions that prompted the teachers to reflect on the project overall, how their individual teaching practices were affected by participation, and specific challenges they perceived in implementing DL in their respective classrooms.

These collaborative meetings included literacy educators, a social studies educator, an historian from the university, and the history teachers. Thus, there were professionals from the three fields, and participants were able to promote collaborative

discussions of diverse content and issues with each other from the perspectives of their own professional expertise. The collaborative meetings were one of three meeting types in the research project in conjunction with coaching each teacher individually in instructional approach of uncoverage (Calder, 2006) and scaffolding meetings designed to support teachers' DL practice in the classroom. Because our larger ongoing project was based on design-based research methodology (Design-Based Research Collective, 2003), it was imperative that researchers consider teachers' perspectives when implementing DL and support them as they attempt to address these perceptions and challenges. Thus, the collaborative meeting functions as a space where teachers share and discuss their challenges, interests, and beliefs with the interdisciplinary team as well as to address issues related to DL practices.

Data Analysis

In response to the research questions, the analysis was focused on teachers' utterances during conversations in the meetings. Among the conversations, attention was paid to utterances that revealed teachers' perspectives, interests, and concerns, instead of utterances related to information sharing, research plans and meeting schedules, or small talk. As already noted, a total of 14 meetings and three teachers' interview protocols were transcribed and analyzed by the authors.

I coded the meeting's transcripts and interview data for sentences or utterances related to the current study's research question. I used the constant comparative method (Glaser, 1965; Glaser & Strauss, 1967) to analyze the data to generate patterns, some of which became key categories (Charmaz, 2014; Corbin & Strauss, 2014). Specifically, in order to understand the data and to gain some ideas, I read the transcribed data several

times. After that, data were coded for sentences or utterances related to the current study's research question. These codes were further coded into common groupings. Through the repetitive reading and analysis, the common groupings from the data were constantly compared and contrasted to create larger categories. From these repetitions, broad themes and patterns that emerged from the data were identified and arranged into the key categories of text use, instruction-focused practice, and motivation-enhancing practice.

Findings

In the following section, I highlight each theme and its sub-themes each with supporting data.

Text Use

Texts are among the most relied upon tools for teaching and learning in secondary education (Greenleaf & Valencia, 2017). Although many researchers have not reached consensus about what text is, traditionally, text is synonymous with written language. However, the definition has expanded to include "any representational resource or object that people intentionally imbue with meaning, in the way they either create or attend to an object, to achieve a particular purpose" in order to include diverse multimodal content (Draper & Siebert, 2010, p. 28). In addition to the content disseminated verbally during in-class instruction, texts include information that is pertinent to meeting learning objectives on specific topics. In particular, "for the novice reader, the available information begins and ends with the text [and] for historical readers, the text becomes a portal to another time" (Wineburg & Reisman, 2015, p. 636). Teachers in our project

discussed the uses of texts in their classes, revealing their perspectives and approaches when selecting and using texts within their teaching practice.

Multiple Texts Use for Diverse Perspectives and Evidence

The necessity and use of multiple texts were relevant to how the teachers recognize the characteristics and roles of the textbook. They shared their own beliefs on a textbook that is one of the main materials for their classes. Catherine said that the IB textbook provides students with how a historian needs to understand the broader context to ask a specific and relevant question. Especially, she argued that the textbook seemed like an encyclopedia. Dawn also said the textbook and Google seemed similar to each other because both of them dealt with the content comprehensively. However, Catherine pointed out that sometimes finding information in the textbook was not easy.

> ***Catherine***: Here's the other thing is that there are a lot of primary sources in our book, but because they're kind of offset in some way, shape or form, the kids are like oh I don't have to read that. Even if there are questions that are directly tied to like the section. One of the more recent study guides that we had, there were a number of kids who were like I just can't find this anywhere, I can't find this anywhere. In my scanning I was like, I'm not finding it either. And I was doing the exact same things as the kids. I was skipping over some of the offset stuff. And I was like oh my god I just did the exact same things, and this is why they can't see it. They were thinking, in that box, it's in a box, so it's not part of the main portion of text, so I don't have to worry about it. (collaborative meeting transcript, 01.18.2017)

She discussed that there might be content difficult for students to understand due to the textbook's structure. Additionally, Dawn maintained that using only textbooks could limit students' opportunity to use diverse sources and that students regarded the

textbooks as not relatable to their own lives. Michael also pointed out that textbooks didn't have enough information for students to do their own writing tasks.

From these conclusions about the limitations of textbooks, the teachers agreed on the necessity of using diverse materials. Of course, all teacher participants recognized that there are some difficulties in selecting texts for their classes since they don't have sufficient time to search for the materials or they are unfamiliar with where they can locate appropriate resources. Nevertheless, they agreed that using multiple texts as sources is crucial to encourage students to take on diverse perspectives and to provide them with sources to augment their historical thinking skills. Specifically, Dawn argued that using more primary sources in addition to a textbook is beneficial for students' learning. Michael pointed out that it's hard to evaluate a source if we don't have another with which to compare it. Echoing Michael's sentiments, Catherine asserted the importance of multiple texts as well, but recognized that there were also limitations with some texts: "[The textbook is] mostly background. I mean it's mostly summary. There's not a lot of specific detail" (collaborative meeting transcript, 12.07.2016).

Catherine pointed out that a limitation of history textbooks is that they lack sufficient information to help students understand contextual elements. This prompted her to consider using multiple texts to complement the history textbooks. Teachers also agreed that a variety of texts is essential in engaging students with historical thinking skills as these texts encourage students to concentrate on the skill of sourcing. Teachers emphasized that merely providing multiple texts doesn't guarantee that students will expand diverse perspectives. For example, when asked about the helpfulness of multiple sources for enhancing students' diverse perspectives, Catherine pointed out that students

tended to read multiple texts without comparing them, by arguing that "[students] can't just assume that having multiple sources means understanding multiple perspectives" (Interview, 01.24.2019). These conversations demonstrated that teachers felt that incorporating multiple texts is essential for students to have diverse historical perspectives, but that students would require guidance to support their understanding of diverse perspectives.

Multimodal Texts as Having Dual Characteristics

As discussed previously, the teachers seemed to recognize that more diverse sources were essential. In particular, teachers cited that multimodal texts, texts that combine two more modes (e.g., visuals, audio, written language), would be beneficial for students to engage in their reading and historical learning. For example, Catherine pointed out that students tended to believe that multimodal texts were more reliable. With the idea that students preferred multimodal texts, teachers discussed the limitations of finding such texts. Dawn shared Catherine's perspective that visual texts have advantages as well as limitations.

> ***Dawn***: I do actually have a bunch of texts for the Monroe Doctrine, and students do like political cartoons in them. But that is oftentimes makes it more confusing because of the fact that the political cartoons are about things from like 1980 Cold War versus the time of expansion. (collaborative meeting transcript, 12.07.2016)

Dawn agreed that visual texts such as cartoons enhance students' interest but noted that multimodal texts don't always lead to student understanding. She argued that the multimodal texts themselves can encourage students to read, but that students may need additional support, such as contextual information, to aid their understanding.

Attentive Text Selection

As noted, teachers asserted the necessity of using diverse primary and secondary sources in addition to textbooks, and they recognized that a variety of texts enabled students to compare those texts and to see diverse historical thinking skills. They discussed what they should consider in text selection such as characteristics of texts, and students' beliefs or responses to the texts. Catherine realized that students tended to trust online sources uncritically. That is, teachers shared that multimodal texts not only engaged students in reading or watching those materials, but that students tended to believe them without questions about the content of those texts.

Specifically, teachers recognized that they should consider the origin, purpose, content, and genre in selecting the readings because students could miss the points of the texts.

> ***Catherine***: We were pre-briefing the first presidential debate…so the student pulled up an article about Obama not leaving office, and the student did not realize that the article was a satirical article, which had been adapted…so he had seen the headline but not investigated. I feel like developmentally, that's sometimes…how often they do that…that "oh is that right thing" because the number of kids…with Rights and Protests, with all the typos…students would not think whether it was right or wrong, but it's so obviously wrong…so they aren't doing that spontaneously. (collaborative meeting transcript, 10.05.2016)

However, the teachers wondered how they could select and employ the texts that overlapped with the textbooks. From discussion among peers, teachers noted that overlapping texts had pros and cons, which depended on each instructional unit and how

familiar the teacher was with the texts. These discussions showed that a teacher also could have difficulty in deciding on history sources and knowing how to select the materials according to which criteria would be helpful for teachers. Of course, teachers worried about text or source selection not only when they should select materials but also when students selected materials.

> ***Catherine***: We will then switch gears around the quarter break to really focus on historical investigation. Unfortunately, the writing skills and intrinsic motivation of the students is low this year. Attribution and plagiarism can be hard sometimes, as well as language and grammar skills. Some students who usually see themselves as strong readers are not feeling so strong right now. I feel that finding a good source can be hard sometimes even though we try to talk about what that is. "How do you know something is good or quality or relevant"? Sitting in front of a computer can encourage passivity and distraction for students. (collaborative meeting transcript, 12.07.2016)

Catherine pointed out that students would have difficulty judging which texts or sources are good for their investigations of self-selected history topics. This difficulty shows that both teachers and students need to know criteria for text selection.

Text Accessibility for Students' Understanding

Students can have difficulty and need support in accessing content when complex texts are inconsiderate, too difficult or voluminous (O'Brien et al., 2017). Considering this issue, O'Brien and Dillon (2014) argue:

> Accessibility—dimensions of a text that make it available to a reader—is not synonymous with matching reading ability to text readability. It is more like leveling, based on a range of factors including text difficulty, but also considering how difficulty

> can be mediated by interest, stance toward a topic, and determination and perseverance to read something one has decided to read. (p. 52)

In this way, text accessibility may require replacing an inconsiderate text with a text that is more accessible or altering an inconsiderate text to improve accessibility. Dawn shared her experience of altering a text that offered valuable information, but that many students found "confusing," noting "I had to rearrange so it even went together, and the kids were like wait a minute. [.....] But this book does it quite a bit. All of a sudden it will throw one sentence in there and be a primary source, because it's a quote from someone" (collaborative meeting transcript, 01.18.2017).

Dawn recognized that students might find it difficult to understand certain texts because the organization was not clear or intuitive to students' informational needs. Although she didn't refer to the concept of text accessibility itself, her endeavor to transform texts to improve access illustrates that she and other teachers recognize "inconsiderate" texts and that there are strategies that can be employed to render texts more accessible for students. This is especially important for a discipline such as history since DL and disciplinary thinking are based on accessing multiple sources. Catherine also agreed that making text accessible is crucial by relating it to multimodal text use, stating, "I think again [multimodal text uses is] accessibility piece, where some students are going to be able to understand the text when they see a visual representation of that text, and so then they can go back to the text and read it with a fresh set of eyes with some kind of foundation." (Interview, 01.24.2019).

As O'Brien and Dillon (2014) argued, Catherine's perspective reflects that text accessibility can be embodied by considering how much students have difficulty

understanding some texts and by providing other texts that complement those texts but convey learning contents more easily. While teachers acknowledged the importance of text accessibility, they all pointed out that the lack of time was a major barrier to creating or selecting texts that are more accessible for students.

Instruction-focused Practice

The primary objective for the collaborative meetings was for teachers to share ideas and perspectives implementing a DL approach with the disciplinary and literacy experts. The teachers spent considerable time discussing their day-to-day teaching experiences and reflecting on their teaching practice. During discussions, the teachers revealed three teaching-specific perspectives which will be discussed further.

Disciplinary Literacy and Thinking Skills as Teaching Goals

Teachers recognized that they needed to consider how to best improve students' historical thinking and DL skills rather than to simply cover historical content. As the meetings progressed, teacher discussions shifted from inquiring about how to teach historical content to how they could best support students' DL and thinking skills through specific practices. Dawn asked students to imagine a situation in which the students interviewed the authors of the sources they used. She noted how this would be good in helping think like historians.:

> Think if there is a historian you're interviewing, and you're in his office, and he takes a phone call, and you check out his bookshelves. What's there? What's not? What should be? It's interesting when students are academically arrogant [….] when are they sure or not? (collaborative meeting transcript, 10.05.2016).

Catherine also suggested that students should try to get answers about how historians analyze historical events based on the sources, asking students to,

> explain how you used the historian's methodology to complete this and how that helped you learn more about how the historian does. What's that mean? Well talk about how you went through the step-by-step formulating a question, but then take it further to how does that, what did that teach you about the process, what did you learn about the work that historians do? (collaborative meeting transcript, 10.20.2016).

To foster connections, Michael tried to relate his instruction to a current issue—in this case the presidential election, "Where did you find it? Why did you think that? Those are good questions to ask. Again, in the era of Trump. So, we'll try to do that again when we do the Lincoln-Douglas debates" (collaborative meeting transcript, 01.30.2017). The teachers emphasized that learning history is enabled by questioning continuously on texts and sources.

Purposeful Close Reading

A theme that resonated throughout the meetings was the critical role of purposeful reading as a prerequisite for historical thinking. In particular, the teachers maintained that close reading is a crucial part of social studies teaching and learning because it helps students understand "what the claim is, how the author attempt to persuade you, and who is the hero and the villain of this narrative" (Michael, collaborative meeting transcript, 12.16.2016), but they were also cognizant that it is not a one-size-fits-all reading skill. During a discussion on students' reading of multiple texts, Catherine shared a moment when her students struggled during close reading:

> They were reading a paragraph and the kids were all tripping up in the same spot. [...]it was the close reading thing. They understood this sentence, and they understood this sentence, and they didn't understand why this sentence was contradicting that sentence. I was like stop thinking about what it says. Just read it, read the whole paragraph first (collaborative meeting transcript 12.07.2016).

Similarly, Dawn argued that close reading is very helpful to comprehend texts line by line, but it is not necessarily beneficial when students are trying to pick out bigger pieces of the text because they will often get stuck on a sentence or a word: "That is the problem with close reading, where they get hung up and it shakes their confidence for the rest of the reading" (collaborative meeting transcript, 02.15.2017). Thus, Catherine maintained that close reading has to be balanced with teaching contexts to be most effective. These teachers' conversations support the idea that teachers need to be able to utilize professional judgement in planning instruction for students' purposeful close reading (Hinchman, & Moore, 2013, p. 447), based on the recognition of students' capacity to effectively read closely.

Complexity and Importance of Writing for Historical Thinking

Teachers recognized argumentative writing as the way that students demonstrate DL and thinking skills in social studies. Students demonstrate historical thinking and literacy skills through historical argumentative writing which is based on students' subjective interpretation from multiple sources. Thus, the teachers emphasized the importance of teaching and scaffolding student writing, especially in terms of substantiating their claims with evidence. Catherine shared that students had difficulty in

knowing what information to pull to support their claims, and she reflected on the need to revisit the initial prompt:

> So there were some kids who answered by only pulling quotes out, not directly answering or addressing the prompt, but only pulling quotes out and not explaining the quotes. And so I don't know, I don't know if that's how it seemed to be presented to them in the question, like I need to go back to the question. (collaborative meeting transcript, 01.28.2017)

Dawn faced similar challenges, noting that students seem unfamiliar with how to use sources to support their work:

> I take a lot of time saying, all you're doing is wasting time in your life re-writing that sentence from that person and you need to sum up what they said, and you need to, and they even, do you write quotes? The whole class: no. You do not write quotes. It baffles me then that they are like I'm just going to requote it. (collaborative meeting transcript, 01.28.2017)

These conversations demonstrate that teachers view historical thinking as not merely summarizing historians' interpretation, but as a way for students to articulate their own interpretations or perspectives through their writing.

How the teachers use writing, especially argumentative writing, was supported in their interviews as well. For example, Catherine explained that "having the ability to effectively argue a point is a critical thinking exercise, and the ability to view, analyze, and evaluate different perspectives is a critical thinking exercise." Michael also said that argumentative writing is crucial because it reifies how students look at multiple perspectives and how they try to compare and contrast the perspectives. The teachers'

conversations demonstrate that they recognize argumentative writing as a representation of students' historical thinking as well as a demonstration of their historical writing skills. The historical writing skills demonstrate how students analyze and interpret diverse perspectives from multiple sources and how they use them as evidence for their claims.

Motivation-enhancing Practice

Although the teachers revealed three teaching-specific perspectives, they did not focus on students' motivational aspects as much. However, in some points, they discussed that students' generic and discipline-specific motivation and engagement should be considered and enhanced.

Centering Discipline-Specific Motivation and Engagement

Unlike prior studies that examined the perspectives and experiences of preservice teachers, this study delved into the perspectives of veteran teachers who had a more nuanced understanding of student engagement and motivation. In some cases, teachers were able to pinpoint students' lack of motivation—believing that one reason was students did not possess the knowledge or skills to effectively critique sources.

> ***Catherine***: I had some conversations with students last year where in one-to-one conversations [they said], 'but I'm just 16, who am I to say that this historian has a faulty argument, or who am I to say that this person who lived through this has some limitations. Like, I just don't feel comfortable being that critical of someone else's work.' And, I would tell them, like go for it, like, be confident. Look for the holes. Look for why it's not enough to just use this source. What more do you need? What is missing from what is given to you in this source? (collaborative meeting transcript, 10.20.2016)
>
> ***Dawn***: Yeah we're trying to keep it in the context of our class currently, because the kids are often like, "I don't even understand why we're talking about this. This is, you know,

> old.” So it's awesome to say look at this that happened and now it's happening now, and like, but then how to keep them on, yes, we want to talk about what's going on, but we still want to like talk about it in terms of where we're at. (collaborative meeting transcript, 01.30.2017)

Catherine noted that students’ lack of self-efficacy was due in part to students believing that they were not knowledgeable enough to critique historians. Thus, she scaffolded the student by proposing some questions step-by-step. In Dawn’s class, the students were unmotivated to read historical sources because the students were bored reading “old things.” To enhance the students’ motivation, Dawn explained that something old can still be related to current political issues. Although the conversations above do not reflect the teachers’ perspectives on motivation in history class directly, the conversations were derived from the recognition that students have difficulty being motivated or engaged in history classes due to the unique characteristics of history learning. That is, it is reasonable to ascertain that the teachers recognize some specific elements that affect students’ learning in history.

Recognizing Generic Motivational Aspects

Of course, in addition to discipline-specific aspects in terms of motivation, the teachers also recognized more generic motivational aspects of teaching and learning strategies. They revealed that their students’ motivation for reading and writing was low, especially compared to the previous year. For example, Catherine wondered how they could get students to show grit in general learning—the meaning of which is passion or perseverance to continue doing something and is certainly related to motivation (Duckworth & Gross, 2014).

> ***Catherine***: I wrote down, you know, where Al and Carol… how do we get them to be in grit mode? Like, how do we…get them to just say this is it? Right, like how do we get them to, say, I wrote, be sure. (collaborative meeting transcript, 10.20.2016)

Also, in order to motivate students to read texts, Michael suggested a kind of study guide to let students know how to study history and how to prepare assessments. He shared his own case in which students liked the guides more than the quizzes because those guides actually motivated the students to interact with texts, and students could create slides or power points on a subject so they could teach someone else. Michael's example supported the idea that teachers consider students' general motivation to interact with texts and their engagement while interacting. Also, teachers recognized that students seemed to be motivated by external rewards or incentives such as getting good grades, which are general motivational elements.

One of the teachers argued that the motivational issue is not simple because it is relevant to broad general and educational contexts. In the interview (01.24.2019), Catherine pointed out that students' motivation may be broadly related to their anxiety around academic production, which is also connected to the educational system. She revealed that the educational system has created elements of trauma for some students that haven't been acknowledged and so, as they go through the educational system and as they are coming closer to high school graduation, unrecognized or unresolved anxieties and traumas continue to build. That is, according to Catherine, there are structural problems that lead students to concentrate on perfectionism in learning to receive good grades. Additionally, she maintained that rather than distinguishing generic and domain-specific motivation, the issue of motivation or engaging students may be connected to the

concept of accessibility, which means how readily students can access materials, resources, and relationships in class.

Discussion and Implications

This study explored what perspectives social studies teachers hold when incorporating disciplinary literacy into their teaching as evidenced by discourse in collaborative planning meetings. From the analysis of the meeting conversation transcripts and interview data, I generated three salient themes from the grounded theory coding: texts use, instruction-focused practice, and motivation-enhancing practice. More specifically, in terms of text use, teachers expressed that using multiple texts with attentive selection provides diverse perspectives and supports the various ways in which students read and learn. Also, while the teachers acknowledged that multimodal texts can be engaging, they also recognized that these texts still require guidance and support to make them more accessible for students. With regard to instruction-focused practice, the teachers revealed three perspectives: (a) DL and thinking skills are their teaching goals; (b) reading skills should be included purposefully according to texts or units; and (c) writing is a representation of students' disciplinary thinking skills. For motivation-enhancing practice, teachers expressed that recognizing and enhancing both of generic and discipline-specific motivation should be considered.

While these results are not surprising, they do augment the current literature and include implications for literacy and disciplinary professionals and teachers. It is essential to consider not only teachers' knowledge of literacy strategies and their uses but to also consider diverse factors that go beyond the literacy strategies themselves, because teachers' enactment of literacy strategies is influenced by multiple factors (Adams &

Pegg, 2012). Considering diverse factors, such as teachers' disciplinary knowledge, their teaching practices for scaffolding, and text uses for those teaching practices, is necessary for researchers to support teachers or for teachers to teach students in the approaches of DL.

As reported, the teachers in the study tended to emphasize cognitive aspects of teaching DL with emphasis on how texts should be used and which instructional practices and beliefs they should establish rather than on motivational aspects. However, they also definitely recognized the importance of considering and enhancing students' generic or domain-specific motivation in class. For example, they argued that teachers should support student self-efficacy in history class. Furthermore, considering that engagement consists of multiple dimensions such as cognitive, affective, and social, actually focusing on how to teach DL itself may be a way to engage students in learning. In particular, the teachers recognized that using diverse sources and multimodal texts can enhance students' motivation as well as their cognitive learning.

In addition to overall implications above, the results of this study raise specific issues related to instruction and motivation. First, it should be noted that determining the extent of using multiple texts, applying close reading, and teaching DL skills is crucial. Second, educational stakeholders should focus more on how to motivate students in discipline-specific classes.

"To What Extent"

The implications from this study raise the issue of to what extent teachers should focus on which instructional practices. First, as reported by the participants in this study, using multiple texts and making texts accessible are crucial in social studies classes.

However, because of the dearth of studies on texts' uses, students' comprehension of the texts, or students' understanding of the impact of other texts on their history learning (Moje, Stockdill, Kim, & Kim, 2011, p. 463), content-area teachers might find it challenging to determine to what extent they should adapt texts or adopt diverse texts.

The concern about 'to what extent' also applies to DL skills. Recent research has explored diverse DL skills in disciplines such as history and mathematics (e.g., Shanahan et al., 2011), but those skills may not be effective in every learning unit or classroom context (Dobbs, Ippolito, & Charner-Laird, 2016). For example, the teachers in the study recognized that sometimes students needed basic literacy skills to comprehend texts. Therefore, teachers may need guidelines to determine which literacy skill level should be taught to which students or in what class situations.

They also argued that the effectiveness of close reading varies for each text or learning goal. That means, although close reading generally has an advantage in that it leads students to read texts purposefully to meticulously analyze what authors intended, for appropriate application of close reading, teachers should focus on the extent of the close reading by considering some issues such as text complexity, text range, pre-reading instruction, and DL (Hinchman, & Moore, 2013).

Motivational Aspects

Since it is widely recognized that motivation plays a major role in students' literacy learning and practices (Guthrie & Wigfield, 2005; O'Brien et al., 2007; O'Brien & Dillon, 2014), it was not surprising to find that the teachers in this study were concerned with students' low motivation and engagement in literacy and thinking. This was especially important because the teachers in this study were veteran teachers who

practiced effective pedagogy. They, in particular, revealed that those motivational aspects may be domain-specific.

The relative lack of motivation of students draws attention to several issues. First, we need to investigate how multimodal texts or multiple texts affect students' literacy motivation and engagement in history. We already know generally that multimodal texts will affect students' motivation positively, but we should have evidence for how those texts should be leveraged to improve students' motivation and engagement and explicitly in ways important in history classes.

Second, we may wonder from where students' motivation and engagement arise. Specifically, we need to know if there are differences between students' general and domain-specific motivation on literacy and if teachers definitely recognize those differences, and if so, what the relationship between both motivation dimensions is. Thus, if they show a different tendency for each motivation dimension, teachers should scaffold students' motivation based on characteristics of each content-area. Of course, these issues will require a consensus of what a *domain* or *discipline* is and what the criteria are for clarifying boundaries among the domains and disciplines (e.g., Fisher, 2019).

Conclusion

Teachers help students shift from being novices to critical thinkers in disciplinary communities by helping them navigate diverse, and often complex, domain-specific materials. It is necessary to acknowledge that history teachers might not recognize themselves as historians. That is, the perspectives that the history teachers showed in this study for their DL instruction demonstrate that teachers consider diverse aspects for their

educational practices that might be unlike the considerations of historians or history researchers.

Although this study centers on teachers' perspectives in the DL project, it should be noted that their perspectives were influenced by their challenges and concerns in working with other collaborators in planning and implementing the DL approaches in their classes. Future studies should focus mainly on teachers' challenges and tensions that they encounter in applying the DL approach with colleagues.

During a collaborative meeting, Michael used the metaphor of gardening to describe DL teaching and learning. He stated that gardeners must possess expertise, skills, and must be able to select from a number of tools to complete specific tasks in order for a garden to grow. Similarly, teachers and students must also draw on disciplinary expertise, context, multiple perspectives, DL and thinking skills in order for successful learning to occur. Michael's is an apt metaphor for a rather complex but rewarding process.

CHAPTER 4. INSTRUCTIONAL PRACTICES FOR ENGAGING STUDENTS IN LEARNING DISCIPLINARY LITERACY AND THINKING

In general, literacy researchers agree that motivation and engagement play a crucial role in literacy development and achievement (Afflerbach & Harrison, 2017; Gambrell, 2011; Guthrie & Wigfield, 2000; O'Brien, & Dillon, 2014). However, a report by the Organization for Economic Co-operation and Development has shown that adolescents in the United States are among the least engaged readers in the world (OECD, 2011). Although this result has prompted researchers to focus more urgently on reading motivation and engagement and their effects on students' academic attainment, we still cannot say with any confidence that research on reading engagement is sufficient. In particular, most studies focus on the effects of various interventions on reading motivation and engagement; few explore how classroom teachers, who are not part of an intervention study and have not been taught specifically how to alter their instruction to promote motivation and engagement, do so anyway. This chapter presents a case study of one such teacher—a social studies teacher who has been actively designing and teaching lessons with DL components but who has had no formal instruction on how to promote motivation and engagement to support her students' learning.

Guiding Questions

How did one social studies teacher motivate and engage students in literacy as part of disciplinary literacy instruction in an instructional unit? More specifically,

- Which instructional practices or activities did the teacher use to foster motivation and engagement in literacy?
- Which texts did the teacher use and how did she use them?

Background of the Study

This study was conducted as part of a larger five-year project that took place in a public high school of a medium sized city in the Midwestern region of the US, as described earlier in Chapter 3. The umbrella project, the Frederick Douglass Disciplinary Literacy Project, was designed to validate components of a multidimensional DL framework and to support high school students and their teachers in implementing this framework. The project was based on collaborations among social studies teachers, literacy researchers, and social studies education researchers. The university research team supported the teachers for their DL teaching and engaging students, based on the notion of *Strategic Engagement* (O'Brien & Dillon, 2014) that emphasizes making motivation and engagement more explicit with consideration of goal clarification, text accessibility and social aspects in reading. However, the teachers were responsible for enacting explicit instructional practices to engage students. In this way, this study is useful to explore more specific instructional practices of a teacher for her students' engagement, who was mainly supported for designing and teaching lessons with DL components.

Methods

Participant

The study focused on a single high school social studies teacher, Dawn (a pseudonym) with over a decade of classroom teaching experience. During the 2018-2019 school year, Dawn taught IB global politics in three classes comprised of mostly junior students. Dawn's background and teaching positionality and practices were as described previously in an earlier chapter. Instead of relying on textbooks in her class, Dawn was

more likely to use assigned primary source material she had tailored to be more accessible. She accomplished this by shortening pieces, updating antiquated vocabulary, and framing the texts with literacy skills and historical thinking prompts. As already noted, she modified the material because she had found traditional texts to be overwhelming for her students. This approach is compatible with the notion of text accessibility—rather than challenging students to read increasingly more complex texts, an immediate goal of teachers in disciplines is to adapt texts or construct texts that are more accessible. Since Dawn had previously collaborated with researchers working on the project for a couple of years, she was expected to have a good understanding of the purpose of the study and scope of the project, as well as her roles in DL teaching and applications of DL.

Data Sources

As explained above, all the data for this study were collected as part of a school-university DL project. Specific data are as follows.

Observations

The primary data source was field notes recorded while observing Dawn's classroom as a whole and also in select student workgroups. The data were collected primarily during her unit on the Syrian War, in IB Global Politics taught between November 2018 and January 2019. During the Syrian War unit, since Dawn taught three classes every day, three members of the research group, including myself, each attended one of her three class periods for the duration of the unit. While observing these 50-minute classes, the researchers focused on all of her teaching practices, including how she used multimodal texts and various practices she used to enhance motivation and

engagement. Approximately 80 hours of classroom observation, based on 35 days of field notes from each of three researchers combined, were produced.

Classroom artifacts

Various artifacts used in Dawn's classes were also collected. In most cases, these artifacts consisted of the printed learning materials that she used to support students' learning, but other artifacts were also used, including displayed images of texts demonstrating various approaches to annotation.

Data Analysis

Fieldnotes were analyzed using constant comparative analysis (Corbin & Strauss, 2014; Glaser & Strauss, 1967). This method of data analysis has been widely used by qualitative researchers to generate findings since it is inductive and comparative (Charmaz, 2014). Through constant comparison, data that are read and reread until patterns emerge. Through multiple coding procedures, including open coding and axial coding, and constantly comparing across data sources and comparing newly collected data with existing patterns, resilient patterns become themes. These are usually termed "categories" and data that support categories are grouped within categories. Data exemples are used to support the categories. Thus, for this study inductive coding procedures were utilized, including open coding and inductive/deductive procedures associated with axial coding, to generate categories and properties from the data. For the classroom artifacts, document analysis (Bowen, 2009) was used to construct connections between the artifacts and other data sources.

Findings

Although the terms *motivation* and *engagement* are often used interchangeably, as explained in the literature review presented in Chapter 2, engagement is multidimensional, including cognitive, affective, or social constructs; what teachers do to guide students via cognitive or social learning contexts is related to what they do to enhance student engagement. Thus, in this study I assumed that all of the teacher's instructional practices that either directly or indirectly encouraged her students to participate in literacy—especially reading, can be considered as ways to engage students in reading and writing. The analysis of data generated three themes: teacher-led practice, materials use, and student-centered activities. The themes and the data supporting each theme are presented below.

Teacher-led Practice

Teacher-led practice means instructional practices that are mainly led by the teacher. Although some student participation is expected, these practices largely relied on guidance from the teacher. This theme consists of the following sub themes: essential goal presentation, preparatory activities, close reading with read-aloud, and teacher-generated questioning. Below I illustrate how each of these is supported with data.

Essential Learning Goals and Essential Question Presentation

As previously discussed in the literature review, learning goals are designed to direct attention and effort toward goal-relevant strategies and activities and away from goal-irrelevant activities; they are also supposed to regulate individuals' efforts, affect persistence and monitoring of goal progress, and are strongly related to subsequent performances (Locke & Latham, 2006; Schunk, 2001). Also, goal commitment is facilitated when people recognize the goal attainment as important and they believe that

they can attain the goal (Locke & Latham, 2002). This means that setting and presenting the goals to students is important for engaging students in literacy and learning. To help students set their learning goals, educators should explicitly discuss with students their macro and micro goals (Paulson & Bauer, 2011)

In spite of the importance of setting learning goals and presenting them to students, in many classes, teachers tend to overlook the importance of learning goals or skip explicitly sharing them. However, in this study, the teacher, Dawn, clearly explained what students would learn in the whole unit and in each lesson period. She began the unit by presenting three essential questions for the Syrian War unit; (a) How does a state establish legitimacy in periods of instability? (b) Which actors have power in proxy wars?, and (c) What are the tensions between maintaining allies and achieving state goals? These essential questions, which were constructed collaboratively in planning sessions, served to focus the unit, governed the selection of print and multimodal texts, and were key in unit assessments. The questions were also aligned with the types of disciplinary thinking that the team considered necessary in understanding key concepts of the unit. Here, I am using these as proxies for broad learning goals.

In addition to providing this overview of the essential questions across the unit, Dawn presented the specific learning targets for each lesson period on a Projection TV (Figure 4.1). She not only presented the learning targets on the screen but also read them aloud, thus emphasizing the learning targets both visually and verbally. The students were expected to understand the essential questions and learning targets to guide their reading and related tasks in each class. The learning targets were worded to convey personal action and success by starting with “I can” instead of “students should,” it

clarified explicitly what students are expected to be able to do. And since the learning targets and essential questions were tied to literacy skills and disciplinary thinking when students were meeting goals, they were using literacy practices and disciplinary thinking successfully. I should point out, though, that since the learning targets were somewhat general, the teacher provided no indication of which specific literacy skills students were using to read and complete certain tasks (refer to Figure 4.1).

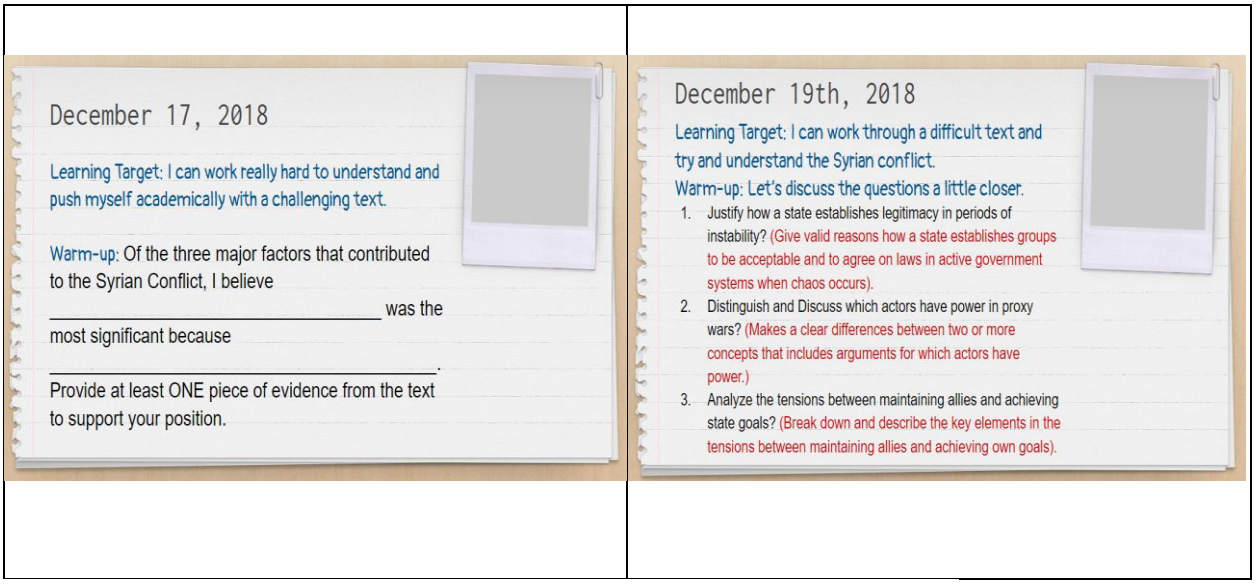

Figure 4.1 Example of Presentation of Lesson Goal and Warm-up Activity

Preparatory Activity

Students' self-efficacy is related to their motivation and engagement in learning (Bandura, 1993; Schunk, 1995). When students feel they are prepared to learn, their self-efficacy is enhanced, so it is important for teachers to help students retrieve their background knowledge or to stimulate it in some way. The warm-up activity that Dawn started each class with is one of the ways often used to retrieve or stimulate students' background knowledge. She always used warm-up activities after presenting the learning targets (Figure 4.1). As she did for the learning targets, the warm-up activities were

presented on the large monitor to help students recognize what they would be doing in the class.

As an example, one day, Dawn started with a warm-up activity that concerned the major factors driving the Syrian conflict based on what students had discussed the previous week. To help students retrieve what they had learned, she provided this template: “of the three major factors that contributed to the Syrian Conflict, I believe _____ was the most significant because _____” (Field notes, 3rd period, December 17, 2018). She required the students to provide at least one piece of evidence from the texts that they had read to support their position. Emphasizing what students had read and requiring them to provide evidence are very important because historical thinking includes setting a position and corroborating it with evidence. When students struggled with recalling the article, Dawn provided scaffolds to help them engage in retrieving their knowledge.

Another example is based on what students saw in Western news sources. Dawn asked students to “explain to their neighbor” how Western news sources were portraying the Syrian war and why the students thought the sources presented the war that way. This stimulated students’ prior knowledge that had been formed not by class materials but by the media. One student responded that “the media portrayed the war as good versus evil” (Field notes, 5th period, December 13, 2018). Dawn asked why they would want to do that, and another student replied that “it will make it seem as if the US was on the right side” (Field notes, 5th period, December 13, 2018). After the students responded, Dawn showed an editorial cartoon to explain how complex and confusing the relationships are

among friends, enemies, and frenemies (persons or groups you are friendly with despite rivalry). Through this warm-up, it was apparent that students got the point of the activity.

In another class period, Dawn provided a warm-up activity in which she asked students to justify the legitimacy of Assad's presidency based on what they had read so far. One student responded that "because Iran supports Assad that adds to his legitimacy as their leader", while another argued that "the issues he was facing show that he is not accepted as the legitimate leader" (Field notes, 5th period, December 18, 2018). When students had difficulty responding to her question during the activity, Dawn told students to look through their reading packet to see if they could find evidence to support Assad's legitimacy or lack of legitimacy as a leader. That is, she encouraged students to engage in using sources and to recognize that historical judgment should be based on evidence.

In summary, this preparatory warm-up activity appeared to help students retrieve or to stimulate their background knowledge, thus helping them engage in reading the main class materials. These activities led students to review and re-read what they had read or learned previously.

Close Reading with Read-aloud

Close reading can engage students in developing a deep and robust understanding of texts, especially in DL teaching (Fang & Pace, 2013). Specifically, close reading leads students to use prior knowledge to make inferences within and across texts, and to compare perspectives (Goldman et al., 2016). In a social studies class, close reading is crucial when students are attempting to make sense of multiple historical texts (Wineburg & Reisman, 2015).

Dawn also used close reading strategies in her classes to help students understand complex historical texts more deeply. However, instead of just teaching close reading strategies or giving students some time for them to carefully read texts, she explored the texts in detail by reading the texts aloud. This practice of read-aloud offers motivational advantages as well as cognitive benefits (Morrison & Wlodarczyk, 2009). Read-aloud provides an opportunity for teachers to convey their own enthusiasm and love of reading and doing so has a demonstrable impact on their students' motivation to read (Applegate & Applegate, 2004).

For instance, one day, Dawn read aloud the text "Tangled Web," which was an accessible text she constructed by making a very academic text more accessible. Dawn used a document camera, connected to a 50" monitor, that zoomed in on the text so her students could see where she was reading; they could see where her finger was pointing in the text as she emphasized something orally; they could see her general location in the text as she moved the book under the camera; and sometimes she annotated the text using highlighting and hand-written annotations to show where the text responded to essential questions, writing notations like Q1 and Q2. Dawn was able to model her reading for ideas through reading the text aloud by combining her pointing and highlighting with verbal explanations and annotations. After she read aloud a paragraph, she explained the content of the paragraph while highlighting relevant parts of the text, including specific key phrases and vocabulary.

As noted, Dawn also explained her displayed reading and highlighting, showing how the target portions of the text were related to specific essential questions for the unit. At the same time, based on the key questions located between paragraphs, she asked

students the questions and added handwritten comments as annotation notes to the text. Through this close reading with read-aloud, she was modeling how she, as an expert, cognitively processed the text. Sometimes, she had a student read the paragraph aloud and then designate the next person to read and she repeated the modeling process. Dawn viewed this modeling activity as a way to get students to concentrate on what they were reading and to perform an assessment in real time indicating which vocabulary they were having difficulty with. She continually explained any vocabulary that students may have had difficulty understanding.

This example of close reading with read-aloud also demonstrated other significant practices. First, Dawn explained where the text was from and who the author was, thus helping students understand the importance of sourcing. Second, Dawn sometimes had a student read a paragraph aloud instead of her. This strategy encouraged students to concentrate and engage in what they were reading, as well as showing the teacher which vocabulary words students were having difficulty decoding or pronouncing. Third, the transformed text included key questions between paragraphs, and Dawn asked students to answer the questions after they read the relevant paragraphs. Close reading can be applied more successfully when teachers ask deeper and more text-dependent questions (Fang & Pace, 2013); hence, this practice should engage students in better understanding the text.

Teacher-generated Questioning

Most educators agree that questioning is an important aspect of teaching and learning. Above all, questioning is beneficial for teachers because it enables them to assess what students know or understand and hence what they need to do to help their students learn. However, in addition to these benefits, questioning may arouse students'

curiosity, stimulate interest, and motivate them to seek further information (Caram & Davis, 2005). These benefits hold even if it is just teacher-generated questioning because it interrupts the usual stand-and-deliver method of teaching, enabling more student engagement. Smart and Marshall (2013) demonstrated a positive correlation between students' cognitive engagement and teacher questioning.

Dawn also used diverse questioning styles to engage students in literacy and learning. First, she asked students about key terms or difficult vocabulary that students could find challenging, terms such as "legitimate" or "opaque". When students responded well, Dawn praised the students, but when students had difficulty answering those questions, she gave some hints or suggested about which materials they could use to gain information to answer the questions. This practice enabled students to focus on and read the given texts. Second, Dawn led students to recall key reading points by asking key questions. The following excerpt from the field notes showed what Dawn did.

> Dawn asks students if they recall what political theory is. Mary provides a basic explanation--that it is a way of thinking about something (she leaves shortly after). Dawn expands upon her definition and urges students to find the pink sheet, which students recall once they see the list of theories. She explains that it will be an activity that they'll do mostly online, Google Forms. [……] As they work, a few students ask clarifying questions, but otherwise get to work, reading and responding on the Google Doc. Students talk as they work. (Field note, 3rd period, January 9, 2019)

Third, instead of asking questions requiring only a Yes or No response, Dawn asked questions that needed critical thinking skills. For example, she asked students about the global implications of the conflict for the nations directly and indirectly involved in

the Syrian War, based on the worksheet (Classroom artifact, 'Tangled Web'). Fourth, in addition to asking questions based on the printed class materials, Dawn tried to ask some questions based on publicly available current affairs sources. For instance, she asked if students had watched a talk by President Trump about the Syrian War and what they had thought of it. By using both predetermined and out of class materials and using open questions, Dawn engaged students in divergent thinking and sourcing skills.

Finally, instead of simply repeating the same question multiple times, the excerpt below showed that Dawn consistently tried to rephrase questions:

> Dawn states they will be focusing on answering the third essential question. She asks students to "Pick an ally and what do they each want?" Students are asking who they could choose." Does Russia count?" Dawn encourages them to say instead of Syria to say Free Syrian Army by encouraging them to be specific. Dawn walks around the room, rephrasing and repeating the question," What does the US want specifically?" Student responds, "Control." Dawn says, "that's a really big response." Dawn says, "What are each of their goals in this?" referring to Syria and the US. (Field notes, 3rd period, January 15, 2019)

Dawn used a diversity of questioning strategies to lead students to read texts carefully and purposefully. She tried to ask both simple and challenging questions, and she also generated questions from both predetermined class materials and current media sources. Additionally, she tried to repeat and transform the question content to help students answer specifically. Through this questioning, students seemed to participate more actively in their literacy and learning activities.

Multimodal Material Use

Teachers use many kinds of materials in their classes. Text can be defined as "any representational resource or object that people intentionally imbue with meaning, in the way they either create or attend to object, to achieve a particular purpose" (Draper & Siebert, 2010, p. 28). According to this definition, many digital materials that are based on multimodality, which refers to "the coexistence of more than one semiotic mode within a given text" (Gibbons, 2012, p. 8), can be considered texts. These multimodal texts can be relevant for students' engagement in literacy and learning. Here, the theme of material use consists of using multimodal learning materials and multimodal teaching tools and making texts accessible with images.

Technological developments have enabled teachers to use a range of multimodal texts to improve the engagement and learning of students. As such, many teachers use images, audio clips, or videos to support their students' learning. Although as yet there are relatively few studies on how, and to what extent, multimodal materials affect comprehension and engagement, the use of multimodal texts is expected to enhance students' motivation and engagement in literacy learning (O'Brien & Scharber, 2008; O'Brien & Voss, 2011). Opportunities for students to use digital texts and tools to learn disciplinary content and to express their interpretations are thus expected to lead to greater student engagement in the cultivation of the digital literacies needed for disciplinary learning (Castek & Manderino, 2017). Above all, there are multiliteracies (The New London Group, 1996); literacy should be viewed as multifaceted, and one aspect of this multifaceted nature is the affordances of texts and textuality related to modality (Rowsell, 2013).

Using Multimodal Learning Sources

One of the characteristics of Dawn's classes was that she consistently sought to incorporate multimodal texts. To kick off the Syrian War unit and stimulate students' motivation to learn, Dawn showed a *YouTube* documentary video entitled "The Boy Who Started the Syrian War". This video was a way to get students interested in the event by connecting a potentially abstract remote and abstract event, to the high school students' own lives by focusing on the role of youths in starting the war. Because this video lasted about 15 minutes, rather than watching the whole video Dawn selected an important section to show to her students.

Dawn used an accompanying *Viewing Guide* that included key questions about the video content. For example, while watching the video, students were asked to answer questions like these: What are some of the ways that the city has been destroyed? Is writing on the wall youthful defiance or active protest? What were the specific effects of the "youthful defiance" by the police? and What were some people doing before the Civil War? These questions were expected to help students understand the video content and to help them engage more deeply in viewing and writing about what they understood.

As another example, Dawn showed a video of a news interview where the Syrian President al-Assad talked about the conflict in Syria. Along with showing this video to students, Dawn gave students a guide that encouraged them to think of key issues. The guide included some questions such as, how did al-Assad position his role in serving the Syrian people? What do you think of al-Assad's opinion of US leadership and their intentions? and How did al-Assad position those he is fighting against? In particular, each question indicated which time frame in the video students should concentrate on. With this guide, students engaged more in watching the video with purposeful concentration.

Based on their writing in response to the questions posed by the guide, students participated actively in sharing their thoughts. For example, a student answered that "it seemed that Assad was oblivious to what his people were really going through and what they really wanted" and another student argued that she didn't think Assad was in a rush to finish the war, referring to specifics from the interview to support this contention (Field notes, 3rd period, January 8, 2019). Notably, when students responded Dawn tried to connect their responses to current events, such as President Trump and his policies. Considering that the content area was global politics, pointing out relationships to political issues seemed to be helpful in piquing students' curiosity and promoting literacy.

Also, it was notable that many students found that watching this video changed their opinions and allowed for even more understanding of the situation. That is, using a range of materials enabled students to approach diverse perspectives on the events. They also said that they found al-Assad very intriguing and after this video they were able to better understand the concepts of legitimacy and power, and foci from the essential questions, than before watching this video. When relating the video to the essential questions, students were able to very clearly pull out pieces of the interview to try and prove their point. The fact that students were able to modify their previous opinions and better understand the topic demonstrates that students became more engaged in literacy and learning activities through this multimodal, multiliteracy activity.

Using political cartoons was another example of engaging students in multimodal literacy use. Among the cartoons that dealt with how complex and confusing the relationships are between the friends, enemies, and frenemies in the Syrian war, Dawn

had students select a cartoon and explain it. She modeled how to judge the cartoon by showing a short cognitive process – "I don't think this cartoon is related to Essential Question 1" (Field notes, 1st period, January 11, 2019). For this task, students were expected to analyze the cartoon based on the background knowledge which they had acquired and learned in class. Also, since cartoons can have a deeper meaning, students were expected to use their literacy skills to analyze the characteristics of each cartoon critically and assess how historical events were portrayed in the cartoon. Above all, they were expected to try to grasp the cartoon's real purpose.

Using Multimodal Teaching Tools

Visual images or materials help students engage intuitively in what they learn (Janks et al., 2013). Using multimodal teaching material enables students to use their growing multiliteracies skills. Because the Syrian War involves complex relationships among a number of different nations and groups, each with their own aims and objectives, Dawn used visual tools to indicate the dynamic relationships among the countries and groups such as who supports whom and who is in conflict with whom. This tool included placing national flags or other group affiliation symbols on a white board (Figure 4.2).

> 2:25 Dawn had students remind of previous learning content by using nation flags. (OC) Using visual images (nation flags) looked very useful and interesting. She explained some characteristics of each nation. [……] A student asked, "why is that called proxy war?" (OC) I think that using the flags and moving the flags frequently is helpful to teach dynamic relationships between the nations but some students might have difficulty understanding it because Dawn constantly moved the flags to explain dynamic relations.

> 2:43 Dawn asked students whether students understand well the dynamic change in terms of nation relationships (friend / enemy). Some students answered they understood, but a few students asked some questions about the nation's relationships. [……]
> 2:50 Dawn asked other questions about whether the set of national flags that she showed was based on friend or enemy (it is like a speed game). Students answered the questions based on what they learned and wrote on their sheet. (OC) It looked useful and interesting for students to learn the global relations among nations. Particularly, students might have to retrieve what they know quickly. (Field notes, 7th period, December 11, 2018)

As shown above, to illustrate the dynamic and complex relationships among the various nations and proxy groups, Dawn used the flags by moving flag tokens around on the board as she explained each relationship. During these movements, she asked questions about whether the set of flags that she showed was based on relationships of friendship or whether the nations or proxy groups concerned were enemies or frenemies. Students had to answer the questions quickly, a kind of speed game, based on which relationship Dawn indicated. Students answered the questions based on what they had learned and wrote their responses on their worksheets. Or they asked questions when they had difficulty answering the questions. This was an interesting way for the students to learn the global relations among the nations because the activity, which required students' quick understanding of an often complex situation, was game-like while at the same time encouraging the students to use their visual literacy skills.

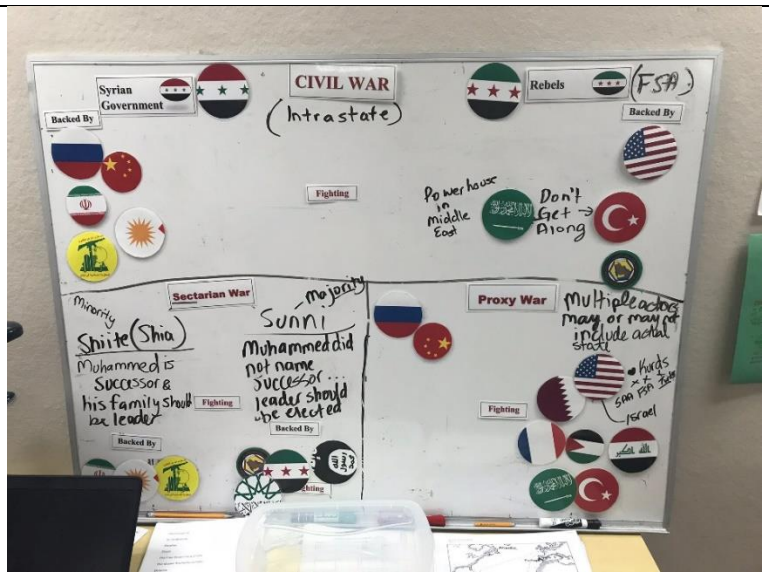

Figure 4.2 Example of the Group Affiliation Flag Tokens as a Teaching Tool (Teacher artifact, 5th period, December 20, 2018)

Making Texts Accessible with Images

Students can have difficulty and need support accessing content when complex texts are inconsiderate, too difficult or voluminous (O'Brien et al., 2017), which can reduce students' literacy motivation and engagement. Considering this issue, O'Brien & Dillon (2014) argue:

> Accessibility—dimension of a text that makes it available to a reader—is not synonymous with matching reading ability to text readability. It is more like leveling, based on a range of factors including text difficulty, but also considering how difficulty can be mediated by interest, stance toward a topic, and determination and perseverance to read something one has decided to read (p. 52).

In this way, text accessibility may require changing or altering an inconsiderate text with consideration of motivational elements to improve accessibility (Lee et al., in press). In this study, Dawn recognized that students might find it difficult to understand

certain texts because the contents were not easy to comprehend or intuitive to students' informational needs. This is especially important for a discipline such as social studies since DL and disciplinary thinking are based on accessing multiple sources.

Thus, Dawn adapted some texts for students' engagement and accessibility with guidance of the research team. For example, Dawn constructed the text "Tangled Web" by making a very academic text more accessible. The text was a journal article originally written for academics, but Dawn and the research team included key notes, questions, and especially images to support students' literacy engagement. Through this work, the text provided a succinct overview of the genesis and players in the Syrian civil war and its global implications.

Student-centered Activities

Students engage more in literacy use and learning when they are asked to do student-centered activities rather than simply listening passively to teacher-conveyed lectures (Guthrie & Wigfield, 2000; Reeve, 2012). To engage students in using their literacy skills, Dawn designed several activities that were mainly performed by students. These activities included a hands-on activity, a group discussion activity, and a writing activity with self-selection.

Hands-on Activities

Hands-on activities are self-generated processes that are immediately enjoyable and interesting, and they involve sensory experiences in which students see, feel, touch and manipulate their physical environment (Guthrie & Wigfield, 2000). Connecting this kind of activity to reading can create situational intrinsic motivation that may enhance readers' involvement in a text (Guthrie et al., 2004). By performing observational

activities or doing investigations that allow them to interact with a topic, students become more engaged in reading texts to perform specific tasks. This situational or immediate intrinsic motivation to read particular texts, complemented by hands-on activities, may result in more permanent intrinsic reading motivation (Wigfield & Tonks, 2004).

Dawn planned and used several hands-on activities. For example, before one such activity, she reminded her students of previous learning by using the affiliation flags on the white board shown in Figure 4.2 and explained again some characteristics of each nation or group by creating a T-chart on the board to explain and compare the Sectarian War and the Proxy War in Syria. She then asked her students to do the hands-on activity shown in Figure 4.3. For this activity, students had to cut out flag tokens with scissors from a handout and attach those for the various groups involved in the Syrian war on a second handout sheet. Once students had attached the tokens, they were asked to write down the names of nations and other groups involved in the sectarian war and those in the proxy war. Students were expected to write the appropriate names based on Dawn's explanation or by referring to the articles again that they had already read in previous classes. Students seemed to enjoy this activity, looking at and referring to what they had read to complete the assignment. This hands-on activity appeared to be a good way to enhance students' reading motivation and/or engagement.

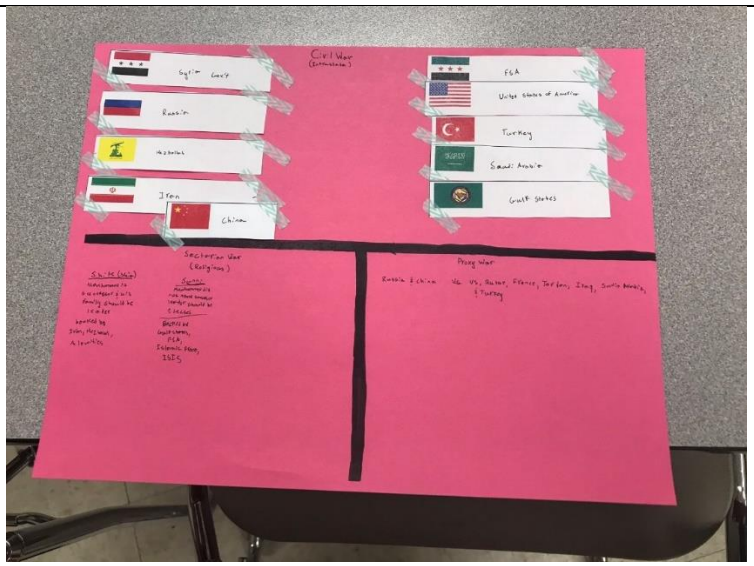

Figure 4.3 Example of a Hands-on Activity with Affiliation Tokens (Student artifact, 7th period, December 11, 2018)

Group Discussion Activities

Reading can be situated within a broader sociocultural perspective—one that involves not only cognition and language, but how these occur within social and cultural contexts (Gee, 2001). From the perspective of reading as a social process, reading events and meaning are constructed through processes of social interaction, and thus successful reading occurs when participants congruently share meaning during the reading event and can derive the author's intended meaning (Bloome, 1983). Ivey (2014) argued that students remain engaged in reading when they participate in dialogical and social group discussions because they view each other as resources when forming opinions.

Ivey and Johnston (2013) also demonstrated the social nature of literate development. Their analysis of student interview data led them to conclude that social activity "[occurs] inside books in the form of dialogical relationships with characters and outside of books in dialogical relationships with others and with selves" (p. 271). They

also emphasized the importance of social activities for engaged reading, proposing the term *transaction* rather than *interaction* for the dialogical relationship. In their study, students reported that talking through and about books with others was one of the perceived causes and outcomes of engaged reading. These researchers showed that social group discussions that enable students to participate in expressing and sharing their thoughts can enhance students' reading motivation and engagement.

In one of her classes, Dawn conducted a group discussion that took the form of a Socratic seminar. For this seminar, students were divided into two groups. It began by one group making a circle in class and participating in the discussion, while the other group assessed the performance of the first group guided by a rubric provided by the teacher. Dawn passed out copies of the rubric at the beginning of the class and explained that these assessments would focus on three questions—(a) whether students contributed quality comments regularly; (b)whether they used excellent evidence and critical thinking skills and kept the discussion focused; and (c) whether they were respectful during the discussion. Students could also write down observation notes. By providing them with this rubric, the students were shown what they were expected to do in the Socratic seminar.

In the seminar, students explored a set of questions that were provided and shared ideas with each other as they discussed the topic. Dawn told her students that they should stay close to the text (the Tangled Web text) and that excluding her from the discussion would make for a better discussion and encourage them to interject their own questions. She provided the following questions for the groups to consider (Field notes, 3rd period, December 11, 2018):

- How does the religious aspect of the war have such a big impact?
- Are the larger powers using the Syrian War for a battleground?
- Who do you think the bigger power is or what happens if one pulls out?
- How does Saudi Arabia play in this war?
- Why are they adamantly demanding Assad's dismissal?

Some students answered the questions, while others expressed their opinion on whether they agreed or not or asked another relevant question. When other relevant questions were asked, students who knew the answer or wanted to explore additional ideas interjected freely in the discussion. Students referred to their readings independently or were encouraged to refer to the readings under Dawn's guidance. After the first group's discussion was over, the two groups switched roles, with the second group participating in the seminar and the first group assessing the performance of the second group.

During the course of these discussions, students frequently paged through their articles, giving the observers the impression that they were navigating the text in a very purposeful way. Some students were looking specifically at their notes and highlights, so they were clearly attempting to use the document to look for answers and support their responses. Although some students appeared to lack confidence in their responses, and there were a few comments that were unrelated to the discussion, most of the students made relevant contributions and indicated their understanding of the major concepts. Overall, the seminar facilitated more student engagement in reading the texts as they participated in the discussions before and during the seminar. Some students might have benefitted from a little more support, such as having the questions beforehand, which

would have allowed them to write short responses that could be used during the seminar, possibly in the form of a short chart/organizer with page references to the article. This type of support may have helped the less capable students in the class to engage more fully in these discussion-based literacy activities.

Writing Activities with Self-selection

Historical argumentative writing is crucial for students' historical thinking. It helps students learn how to interpret and construct claims based on their selection, integration, and explanation of the evidence, rather than simply focusing on factual recall (De La Paz et al., 2017; Monte-Sano, 2016). Dawn also planned some writing time that was specifically dedicated to historical writing. To do that, she seemed to consider how to motivate students to write more. Researchers maintain that human motivation may be relevant to an individual's need for competence, autonomy, and relatedness (Deci & Ryan, 2000). Autonomy, which refers to "volition—the organismic desire to self-organize experience and behavior" (Deci & Ryan, 2000, p. 231), may be related to how much choice people have when doing something. Choice has been identified as a powerful force that allows students to take ownership and responsibility for their learning (Rettig & Hendricks, 2000). Thus, motivation increases when students have opportunities to make choices about what they learn, especially when they believe they have some autonomy or control over their own learning (Jang et al., 2010).

Dawn sought opportunities to provide her students with choices for their writing tasks. For example, when she assigned an exit writing task that was about a pair of friends or enemies in the Syrian conflict, she allowed her students to pick two nations by themselves (Field notes, 7th period, December 11, 2018). Students were required to

explain why they had selected their two countries and why they thought the relationship between these countries had an impact on the Syrian conflict. Allowing students to select the focus of their writing tasks can be regarded as giving choices to students, enabling them to discuss the nations or relationships that they found interesting. In another free writing task, used as an exit ticket at the end of a class, Dawn presented three writing questions. Instead of selecting one topic herself, Dawn had students choose the topic that they wanted to answer and discuss.

In these writing tasks, Dawn emphasized that students should support their arguments with appropriate evidence. To find good evidence, students had to look through and reread the articles or handouts that they had already become familiar with. That is, the writing tasks encouraged students to read the given texts again. Dawn assisted students who had difficulty finding and selecting good evidence from their available resources. Although how much students were motivated by their self-selection in writing tasks was not clear, it was obvious that Dawn provided students with choices and her students did seem to try to concentrate on their assigned tasks.

Discussion and Implications

This study explored what one social studies teacher did to engage students as part of an instructional unit. While teaching a unit on the Syrian War, the teacher, Dawn, used a range of practices to enhance her students' engagement in literacy and learning. Primarily through an in-depth analysis of field notes and artifacts, three themes were generated.

The first theme, teacher-led practice, is made up of four sub-themes. To motivate and engage students in DL or learning, Dawn consistently set and presented learning

goals and targets at the beginning of each class that made students focus on what they would be reading, writing, or seeing in that class. By using a preparatory activity to start every class, Dawn led students to retrieve what they had already read or written to help them build upon what they had already learned. Close reading with read-aloud sessions motivated the students to concentrate on reading the given texts carefully. Teacher-generated questioning helped the students focus on the class reading materials or listen to the teacher's explanations.

The second theme, multimodal material use, had two sub-themes. In this unit, Dawn used multimodal materials frequently. In addition to using multimodal materials for teaching and learning, she made materials more accessible by adapting and including some elements in texts. All of these uses were ultimately relevant to student learning, but it appeared that students were more motivated to participate in the literacy use or learning situations as a result.

The third theme, student-centered activity, incorporates three sub-themes. Hands-on activities enabled students to experience physically enjoyable activity and also motivated them to read texts to finish each activity. Since group discussion needed students to be prepared to discuss the given topic, this led students to look for, read, and refer back to what they had already read or learned. Finally, by making students self-select their topic for various writing tasks, Dawn tried to motivate students to write.

Discussion

Dawn's use of these instructional practices shows that teachers can use diverse teaching strategies and learning activities to engage their students in literacy or learning. In particular, Dawn used close reading practice and planned several historical

argumentative writing activities, which are regarded as important for students' development of DL and disciplinary thinking (e.g., Fang & Pace, 2013; De La Paz et al., 2017). It is particularly notable that Dawn added motivational practices such as read-aloud and self-selection to enhance her students' motivation and engagement in literacy. These are examples of how teachers can design and plan their class by considering the need to both teach DL and enhance student motivation.

Although it was difficult to say all of Dawn's instructional practices for enhancing students' motivation and engagement were discipline-specific practices, such as historical essential question presentation, close reading with read-aloud and historical argumentative writing with self-selection, this could mean that generic practices may be important at the same time in incorporating DL. This may also be because the teacher and students were dealing with somewhat well-refined or well-arranged learning materials rather than the "raw" materials that typically require DL in social studies. Or, it may also be because there were not many writing opportunities that required comprehensive DL and disciplinary thinking skills in Dawn's classes. In other words, since there were not many learning chances themselves that focused specifically on DL skills, finding domain-specific motivation-enhancing practices was not easy.

Nevertheless, even generic instructional practices that Dawn used also seemed to reflect characteristics of the content area. For example, although it is difficult to say that using multimodal texts is fully new or discipline-specific, it seemed that Dawn grasped the characteristics of global politics that need multiple texts and that she sought to provide more diverse types and formats of texts by considering students' motivation and engagement. This implies that educators and researchers may need to pay attention to

what extent generic engagement-enhancing instructional practices should be used as well as exploring and developing newer discipline-specific instructional practices for students' motivation and engagement (Lee et al., in press).

Several points should be noted. First, although it might be unclear how much Dawn understood the importance of motivation and engagement, which influenced the precision to which she employed them, it is clear that most of the practices or activities in her classes were related to enhancing students' engagement. This may be because the term *engagement* can include many different aspects, including cognitive, affective, and social participation, concentration, and commitment. However, it appeared that many of Dawn's instructional practices aimed to engage students in the cognitive dimension.

Second, although there are some activities or practices for discipline-specific literacy skills, such as sourcing, contextualization, and corroboration, most of the practices or activities Dawn employed depended on more general literacy skills—the specifics of which I elaborate in point three to follow. Even though her classes did not require students to consult diverse sources or write argumentative essays, Dawn's classes likely represent typical classes across a wide range of content areas, meaning that it was difficult to find instructional practices that were more discipline-specific with relation to motivation or engagement.

Third, as mentioned, most of the practices Dawn used to enhance motivation or engagement in class were related to general literacy or learning. Those practices that were analyzed here, such as presenting learning goals, using multimodal materials, and generating teacher questions, can be used in any class regardless of content area. Of these, Dawn tended to use more multimodal sources to enhance her students' learning

and motivations. Like many other teachers, in order to support students' motivation in discipline-specific classes, teachers need to consider what they should place a greater emphasis on rather than finding new material or creating new practices.

Fourth, it is difficult to say overall whether Dawn's instructional practices only affected students' literacy motivation and engagement. Given that students' learning mainly occurs through their literacy activities and learning practices and the two are closely related, it may be more logical to say that Dawn's instructional practices were directly or indirectly related to enhancing students' literacy motivation and engagement.

Implications

These findings suggest some directions for future studies on instructional practices for motivation and engagement in discipline-specific classes. First, future studies should explore how content area teachers motivate their students. Above, I argued that content teachers enhance their students' motivation and engagement via existing, typical practices rather than explicitly changing instruction and introducing novel practices designed specifically to enhance motivation and engagement. Future studies should explore this possibility in more detail by studying which motivation and engagement approaches mesh with DL approaches unique to specific disciplines.

Second, how well content area teachers are prepared for close reading strategies needs further study because close reading leads students to engage cognitively in reading texts. Learning to closely read and analyze disciplinary texts like an expert in a particular discipline can be an important aspect of building DL (Shanahan & Shanahan, 2012), so teachers need to know how to teach the discipline-specific methods related to using texts, skills, and strategies for reading and writing in different disciplines.

Third, the effects of multimodal materials in social studies class should be more investigated. In this study, Dawn used many multimodal materials, including video clips, graphic organizers, interviews, and cartoons. It seems clear that these materials helped her students engage in the various literacy or learning activities. However, it would be interesting to explore precisely how multimodality affects literacy engagement or learning compared to printed version sources. Also, given that social studies classes, especially those that focus on history or global politics, need more historical sources that may involve complex and difficult contents, we need to develop a better understanding of how teachers can and should make texts accessible by considering motivational aspects and including multimodal elements.

Fourth, researchers need to examine which types of writing tasks are particularly effective for student motivation in each discipline. In social studies classes, argumentative writing is a good way to lead students to use their DL skills comprehensively (De La Paz et al., 2017; Monte-Sano, 2016). However, teachers also recognize that writing is a demanding activity that can lead students to hesitate to participate. To address this problem, teachers need to apply diverse techniques to enhance their students' writing motivation and reading motivation as well if the writing task includes readings, as Dawn did in her classroom. Dawn gave some choices to students, but there may be other elements that could contribute. For example, instead of describing writing protocols academically, teachers could explain the task using storytelling. We need to consider how to design writing tasks by considering various motivational elements, and then examine how well each task works to build student motivation and engagement.

Fifth, since students are known to be influenced by what their teachers say, we may need to explore how best to motivate students' literacy by using a range of teachers' verbal motivational strategies (e.g., Green, 2002). In this study, Dawn attempted to engage her students' literacy or learning by questioning, but more studies are needed to determine how teachers' verbal questioning or motivational strategies vary across disciplines. Although there are already some guidelines for general questioning in class (e.g., Caram & Davis, 2005), content area teachers may need to develop discipline-specific guidelines that list the most appropriate questioning styles or levels for each content area.

Conclusion

This study explored how a typical social studies teacher taught her class, focusing specifically on how she altered her instruction to promote motivation and engagement. The study investigated how the teacher designed and taught lessons with DL components that supported students' motivation and engagement in literacy. Although this study was based on the teacher's practices and teaching artifacts rather than the students' direct responses such as student interview or questionnaires, significant educational implications were identified, as listed above.

There is no doubt that students' motivation and engagement are different for each content area. However, this study showed that it remains unclear that teachers' practices for enhancing students' motivation and engagement can be or should be different for each content area and that studies need to be conducted to settle this issue. Future studies will augment which practices and how discipline-specific instructional practices work in each

content area. Further research is also needed to explore how these domain-specific motivational approaches can be assessed or discovered in actual classrooms.

CHAPTER 5: EXPLORING STRATEGIC ENGAGEMENT COMPONENTS IN A DISCIPLINE-SPECIFIC READING TASK

Literacy skills within specific disciplines are essential if students are to engage in the critical reading, writing, and discursive practices needed to construct understanding. However, research over the last 20 years has demonstrated that pre- and in-service teachers across disciplines do not readily take up literacy strategies and practices in their content area classrooms (e.g. Alvermann & Moore, 1991; O'Brien et al., 1995; Fang, 2014; Hinchman & O'Brien, 2019). In recent years, many disciplinary literacy (DL) studies and theoretical papers have spurred ongoing discussions about how literacy processes and practices intersect with students' disciplinary thinking and learning (e.g., Moje, 2015; Shanahan & Shanahan, 2012). Even so, few studies have explored students' motivation within various DL approaches that have been proposed, even though scholars acknowledge its importance across disciplines (Shanahan & Shanahan, 2014).

In their content classrooms, teachers tend to focus on either cognitive strategies or enhancing motivational elements but seldom teach both explicitly and concurrently (O'Brien & Dillon, 2014). This raises the question of how both cognitive and motivational aspects can be explicitly taught and supported within content area classes. As explained in Chapter 2, the strategic engagement (SE) framework can be a good way to include both aspects when teaching and assessing students' reading. In this study, I explore how students respond to questions based on the SE components and how useful the SE components are for identifying and enhancing students' reading achievement. The findings of this study will contribute useful information for those developing and

validating instructional models based on the SE framework in reading for different content areas.

Guiding Questions

How can we assess students' motivation and engagement related to reading within a discipline? More specifically,

- What are students' responses to the SE framework components when reading a discipline-specific text?
- How do those responses vary according to readers' achievement levels?
- What group differences are there according to levels of cognitive and motivational aspects?

Background of the Study

This study took place in a public high school in an urban city in the Midwestern region of the US. This school has more than 100 staff and over 900 students. A comprehensive curriculum is available for students that includes enriched curriculum opportunities such as Advanced Placement courses, College in the Schools, Career and Technical electives and College classes. Approximately 60% of the teachers in the school have a master's degree or higher degree, and approximately 90% have more than 3 years of experience. The school has some racial and socio-economic diversity but is considered to have a low number of students of color, with approximately 89.9% identifying as White, 5.8% as Hispanic or Latino, 1.2% as Asian, 1.1% as Black or African-American, and the remaining 2% as other minorities. Around 20 % of the students receive free or reduced-price meals.

Methods

In this section, I will describe participants of the study. I will also detail the exploratory mixed method design procedures (Creswell & Clark, 2017), data collection and analysis. In an explanatory mixed methods design, quantitative data delimit the qualitative portion of the design—that is, depending on the quantitative data, qualitative data are collected to inform the design of the quantitative components. In this study qualitative data and analyses were used to explain students' quantified reading achievement levels, specifically how the data are related to students' reading achievement.

Setting and Participants

The students participating in the study were enrolled in a social studies class taught by John (pseudonym). John had more than three years teaching experience, including his preservice training. He initially joined the Frederick Douglass Disciplinary Literacy Project at Frederick Douglas High School, the original location of the broad project which was conducted by a school-university partnership. John was part of the project originally as a teacher candidate, but later joined the faculty as a teacher. Through the research project, he learned how to apprentice his students in historical thinking and supported their learning of other disciplinary literacy practices. He explained that he considers teaching disciplinary thinking to be beneficial for students both in and out of the classroom because disciplinary literacy and thinking skills enhance students' critical thinking skills. Based on this perspective, he enthusiastically shared his unit plan, instructional practices, and challenges or concerns with the members of the university research partnership team.

The 66 participants were ninth-grade students who were taking a history class with John in the spring of 2020. Data were collected using Google Forms due to the COVID-19 pandemic, which restricted site-based data collection. Initially, more than 90 students were expected to participate in this data collection, but the limitation of distance learning led to some attrition. Also, some students just chose not to volunteer.

Data Source

Data were collected from a total of 66 students in three sections of US history classes taught by John. As noted, students' responses were collected using Google Forms.

Content Reading Inventory (CRI)

To measure students' comprehension of the texts in the discipline, a researcher-constructed reading task was used. A Content Reading Inventory (CRI) was created to assess readers' performance on specific texts that students were either reading at the time or would be required to read in their content class. The CRI format I used was adapted from Readence, Bean, and Baldwin (2004). The CRI included a total of 13 questions on comprehension at recall and inference levels and vocabulary knowledge (see Appendix A). The total CRI score was 23.

In order to assess how students' motivation was affected by the SE components, before and after answering the CRI questions, students were asked about their motivational and cognitive strategies using both multiple choice and open-ended questions. The multiple-choice questions were included to enable students to judge and quantify the extent of their motivation. In a significant variation from previous research on motivation related to literacy, instead of asking and assessing general motivation, I

designed discipline-specific or task-specific questions where I collected information on students' perceptions before and after completing the reading task.

Reading Questionnaire for Strategic Engagement Components

To explore how important it is to emphasize the cognitive and motivational aspects concurrently, existing questionnaire items were adapted to serve as proxies of SE constructs (see Appendix B). The questionnaire examined the following constructs: Reading task value, cognitive regulation in reading, and motivational regulation in reading. For the constructs of task value and cognitive regulation in reading, I adapted items from the Motivated Strategies for Learning Questionnaire (MSLQ) (Pintrich et al., 1991). This questionnaire consists of fifteen subscales based on classic social–cognitive learning theories and is widely used to predict academic performance. For the construct of motivational regulation, items from Wolters and Benzon (2013), which is a self-report instrument to assess students' use of strategies for the self-regulation of motivation, were selected and adapted.

The MSLQ is an 81-item self-report measure comprised of the fifteen subscales described above. The items assess both student motivation to engage with course material and their learning strategies. All items use a Likert-type scale, offering students a seven-point response option format (1 = "Not at all true of me" to 7 = "Very true of me") with which to respond to each item. Since this study is based on the construct of strategic engagement that includes reading goals, reading value, cognitive regulation, and motivation regulation in reading, components were selected by adapting relevant items for a reading-specific situation, namely items from the components of Task Value and Metacognitive Self-Regulation. The item adaptation consisted of minor revisions such as

changing the phrasing to match the discipline-specific reading materials. Items 1 – 6 and 7 – 11 focus on cognitive regulation in reading and reading value constructs, respectively.

Since the MSLQ does not deal with motivational regulation, some items were adapted from Wolters and Benzon (2013) to measure motivational regulation strategies for sustaining or improving students' efforts, persistence, or desire to complete the reading of the text. Minor revisions to the items, included, for example, changing the word "materials" to "texts", to make the items reading-specific. Items 12 - 15 measure students' reported efforts to make reading texts more valuable by making the material seem more useful, interesting, or important. Items 16 - 19 focus on students' efforts to improve their understanding or read as much as possible.

Procedures

Students' engagement and understanding via reading were studied in three data collection phases detailed below. These are considered in turn in this section. I used Google Forms for data collection in all of these phases with students responding or answering the questions using digital devices such as laptops or smartphones.

Part I

In the pre-reading phase, students were asked to skim through the directions and the individual items for the tasks that they would be required to do prior to actually reading the text. They were asked to skim the text and task related to reading but not do the actual reading yet. The students were then asked to respond to a series of pre-task questions regarding their judgment of their own goal setting, background knowledge use, reading activity plan, self-efficacy, and the value in the reading task. These elements reflect the SE components. For example, background knowledge use and reading plan

served as proxies for cognitive regulation in reading. The questions asked whether students set specific goals and why, how they try to connect what they already know to the text and why, which plan they have for how to read the text and why, whether they think they could read the text and why, and whether they think that reading the text was valuable to them and why.

Part II

Next, students completed the tasks by carefully reading the text, which dealt with a topic that they were learning in their US history class, and then answered the reading questions in the CRI. The questions consisted of these types: comprehension recall and inference questions, and vocabulary items.

Part III

Here, students were asked to answer post-task questions regarding their motivation during the task. The questions focused on whether and how they monitored their reading processes while reading the text, how well they were able to maintain their concentration when reading the text, and what they did to maintain their motivation to read when they were less motivated to read. Finally, students were asked to respond to the reading questionnaire.

Data Analysis

The study used a mixed methods design data analysis (Creswell & Plano Clark, 2017) to focus on the relationship between students' open-ended responses and their CRI scores rather than examining their open-ended responses or CRI scores separately. Students' CRIs were scored using a standard key and yielded a raw score indicating how correctly the students answered the reading questions. To investigate which specific

characteristics students show in the SE components and how well the SE components identify students' reading achievements, students were divided into two groups by the students' CRI median score—high and low achievement based on their CRI scores (see Table 5.1). The quantitative data from the scores of CRI and motivation questions were initially analyzed descriptively to determine the numbers of students in the two groups in terms of their performance in both disciplinary reading and motivation; this quantitative categorization was used to group qualitative responses that indicated various reasons why learners in these categories might respond the way they did. A constant comparative analysis (Corbin & Strauss, 2014) was used to analyze students' open-ended responses. The type of data analysis is widely used for qualitative research to generate findings since it is both inductive and comparative (Charmaz, 2014).

CRI Scores	⇒	Grouping Students (Low, High) by the CRI median score	⇒	• Describing and analyzing student scores of motivation questions • Describing and analyzing student open-ended responses in each group • Doing 2 X 2 ANOVA analysis

Figure 5.1 Process of Data Analysis

To explore the parallel importance of cognitive and motivational aspects in reading, which is the main underlying concept for SE, an Analysis of Variance (ANOVA) was used to examine the differences between the groups based on the students' responses on the reading questionnaire. The data were analyzed utilizing a 2 (cognitive aspect: low, high) × 2 (motivational aspect: low, high) ANOVA design,

yielded these four comparison groups: high cognitive/high motivational, high cognitive/low motivational, low cognitive/high motivational, and low cognitive/low motivational. The dependent variable was students' total scores on the CRI task. The cognitive aspects were based on the questionnaire items for cognitive regulation in reading, and the motivational aspects were based on questionnaire items on the reading task, the regulation of reading value and the mastery goal orientation. As explained above, these questionnaire items were adapted from the two existing instruments. The R 3.6.3 statistical software was used for the statistical analysis.

Findings

The findings are organized around analyses of two main sections. The first represents the qualitative analyses, the main finding of this study and is based on the analysis of the students' open-ended responses. The second is quantitative analysis, the results of the two-way ANOVA.

Open-ended Responses

Students were categorized into two groups based on the median of their CRI scores to analyze their open-ended responses. A few students on the median score of 15 were included to the high scoring group. This categorization was selected to reveal explicit differences in the SE components between the two groups and, in turn, to see how appropriate the SE components are for identifying the levels of students' reading motivation and engagement. Of the 66 participants, 35 were identified as high scoring (HS) and 31 were identified as low-scoring (LS) students. Specifically, the CRI mean score was 14.67 of 23 with the standard deviation of 5.26 and the median score was 15. The mean and standard deviation of the scores of the HS students were 17.56 and 2.04,

respectively. The mean and standard deviation of the scores of LS students were 9.17 and 3.98, respectively.

Since the range of the task-specific motivation questions were only 1 to 5, I described the average of student responses instead of running statistical analysis such as t-test. Thus, in the finding, the difference from the scores of the motivation questions means not statistical difference but descriptive trend, which is one of the limitations of this study.

Goal Setting and Defining

Students were asked how often they set or defined specific reading goals when reading the provided historical text. Students were first asked to rate the extent to which they agree using the 5-point scale, and then to explain which specific goals they set. The mean scores for the responses showed different trends for the two reading achievement levels, with the HS and LS students returning means of 3.7 and 2.8, respectively. The HS students appeared to set more specific reading goals to read a historical text than the LS students. This was explored in more depth in the responses to the open-ended questions, as explained below.

High-scoring Students. The HS students reported a range of reading goals. Many of these students focused on generic reading goals. For example, one of the students said that “I tried to capture important points and to remember these when reading the text as much as possible.” Students also reported that they would set reading goals such as inferring logically the text points, using contextual clues in the text, and understanding the concepts or the author’s argument. Although a few of the students reported that their goal was just to read the text, most of the HS students focused on reading goals based on

comprehension (e.g., “When I read I have a goal set for myself that I can read most questions and know what they are talking about and what they mean because if I read the reading well, then I should be able to know what a question is talking about”), while a few reported goals related to goal orientations, performance and learning. Some students said they set particular goals such as getting higher than a C grade, but others considered learning itself, where they could learn what they did not know, to be a reading goal.

Interestingly, although many students set fairly generic reading goals, some of the HS students defined more discipline-focused goals (e.g., “My goals for historical reading is to be able to understand our worlds past pretty well.”). They reported that they would understand what the past world looked like, learn specific topics and lessons from historical events, figure out historically important concepts, phases, and quotes, and look for what had happened in the past and how that affects us today. As with the generic reading goals noted above, a few students said that reading the historical text was their reading goal itself because they enjoy reading historical texts (e.g., “I have goals because I do enjoy learning about history and want to understand why I am learning about the topic.”). These learning or performance goals, whether generic or discipline-focused, show that goal orientations can affect students’ goal setting or defining when reading.

Low-scoring Students. While the HS students tended to report more diverse reading goals, the LS students generally set less specific or abstract reading goals. Although some students reported that they would set goals such as remembering important points in the text, learning more than two key points from the text, or looking for important words and concepts, most said that just reading, comprehending, or understanding the text is their reading goal. One student said that “getting a good grade is

my goal from reading". As for some of the HS students, these goals were based more on generic reading goals that applied across content areas.

One interesting point is that many of the LS students said they do not set or define reading goals because they do not like reading, do not know what they should do to set reading goals, or are not interested in reading and cannot stay focused. These responses show that for the LS students, goal setting can be quite relevant to their reading motivation. A couple of students said that although they do not set specific reading goals by themselves, if someone let them know specifically or if they know in advance what they should do with each text they would be able to set appropriate reading goals. Specifically, one student reported that "If I know in advance what I am reading about and what I need to look for, I pay more close attention to key details from the text with my own goals."

This response may be an example of how difficult setting reading goals is and how important the teacher's role is in terms of guiding LS students in setting reading goals. In addition to discipline-focused reading goals, the LS students also suggested they would set their reading goals in a more discipline-focused way, for example by setting reading goals to learn historical events in terms of who, what, when, where, and why, or remembering historically important people, dates, and events. However, the number of discipline-focused reading goals they reported was fewer than the HS students listed.

Comparison between the Two Groups. As the descriptive data presented in Table 5.1 show, students in both groups tended to mention two types of reading goals: non-discipline-focused and discipline-focused. However, instead of focusing more on discipline-focused goals, both groups of students reported more non-discipline-focused

goals. The main difference between two groups appears to be that while the HS students tried to set goals specifically for comprehension, the LS students focused more on abstract goals such as just reading a text. Compared to the HS students, more LS students reported that they do not set reading goals at all, or they do not know how to set goals.

Table 5.1 Comparison of Frequency on Goal Setting

Group	Generic Goal (non-discipline-focused goal)			Discipline-focused Goal			None
	Comprehension-Specific	Abstract	Goal-oriented	Comprehension-specific	Abstract	Goal-oriented	
HS (37)	17	9	4	4	2	-	1
LS (29)	8	10	1	3	-	-	7

Cognitive Regulation in Reading

To investigate the students' cognitive regulation in reading, their use of background knowledge, planning, and monitoring reading processes were used as proxies.

Background Knowledge Use. Students were asked to respond to a question asking how often they connect their background knowledge to the historical text. As noted earlier, students were asked to first rate the extent to which they assume they use background knowledge using a 5-point scale and then to explain how they connect their background knowledge to what they read. Although it was not large, there were different trends in the two groups, with the HS and LS students having mean scores of 4.2 and 3.7, respectively. This indicates that more of the HS students sought to use their background knowledge when reading a text than LS students. This may be because the question looked vague to the students; regardless of the group, most of the students tended to

answer the question of how they connect what they know to the text by simply rephrasing the question itself.

> How I try to connect the text is taking parts that are similar and putting them together with the last bit of text to better understand what the text is saying.
>
> If I have learned something that is in the text I can use that previous information to help me better understand what is going on in the text.
>
> If I am reading something and I already know something about it I try to connect why those things happened and how they go together.
>
> I connect what I already know by making comparisons, finding differences and finding things that are the same. I do it most the time in my head.
>
> I look at words I've heard before and dates. When Its history I make a timeline in my head and then pick where we are on said timeline.

Although it was difficult to determine precisely how students in each group used their background knowledge to support their reading, as shown the examples above, it did seem that the HS students had a better idea of how to connect their prior knowledge to their current reading. Most of the LS students simply reported that they tried to connect what they know to what they are reading or to remember what they learned, but some of the students in the HS group did try to report more specifically on how they use their prior knowledge. For example, some students said that in connecting what they know to the reading, they think of similarities and differences between their prior knowledge and the current reading content.

A few students reported that they skimmed the text first to work out which background knowledge they should extract, while other students focused more on discipline-specific ways to extract prior knowledge. An example of this is shown in the

final example above, in which a student tried to construct a historical time frame in their mind and extract the knowledge that is relevant to what they are reading. Overall, although it is not that clear, these responses demonstrate that the HS students seemed to be more apt to use their prior knowledge and more aware that there might be discipline-specific ways to extract their prior knowledge.

Reading Plan. Students were asked to respond to the question of how they plan to read the historical text. As before, students were asked to rate the extent to which they plan to read using a 5-point scale first before moving on to explain how they plan to read the text. The mean scores for the responses showed again the trends differently according to the reading achievement levels, with the HS and LS students scoring 3.4 and 2.3, respectively. This indicates that the HS students were more likely to try to plan what they would do when reading a text compared to the LS students. In the following, the two groups of students' explanations of how they plan their reading is discussed in more detail.

***High-scoring students*.** Even among the HS students, many tended to just read the text from the beginning to the end without any special reading plan. However, a number of them did say that they plan specific ways to read the text. For example, some students reported "when I plan it is to try to read the thing in a specific order to make it flow in the best possible way from one article to the other.", "I plan, and I do it in a specific way. First, I like to skim to see what I am reading. Second, I read it carefully after reading the question. Last, I break it down and get the answer.", and "I read a paragraph and think about the main idea of that paragraph and then add on the next main idea to the one I've already had."

Interestingly, unlike the LS students, a few of the HS students reported that they use a more discipline-specific plan for historical reading. As an example, a student said that "I read the historical text by finding out when each historical event happened and then reading about that event in the text in order to understand the text chronologically." In a way, this reading strategy can be regarded as a kind of discipline-specific reading skill.

***Low-scoring students*.** Most of the LS students also reported that they read the text from the beginning to the end without any special plan, although like some of the HS students, some of the LS students said that they would read the text by focusing on main points. One interesting point here is that some of the LS students said that they read sections at a time with short breaks or they take notes while reading, which was not what the HS students reported. Another interesting response came from one student who argued that "planning on how to read puts more stress on me because then it's another 'goal' I feel like I have to accomplish and I have to follow the plan." This response might be because he considers the term 'plan' to indicate a complex step rather than a simple reading process that readers have to go through, although it is also possible that he thinks that just reading without any specific plan is less stressful.

***Comparison between Two Groups*.** Table 5.2 shows the descriptive comparison between the two groups. The HS students appeared to use specific plans more often than abstract plans. They reported using strategies such as skimming, re-reading, summarizing, and setting a specific order for their reading as specific plans. In contrast, the LS students tended to focus more on abstract plans. In this context, an abstract plan means that students simply read the text from the top to the bottom without special or

individual plans. However, some students in both groups said that either they did not set a plan at all or they did not recognize the necessity of establishing a reading plan.

Table 5.2 Comparison of Frequency on Reading Planning

	Specific Plan	Abstract Plan	Non-plan
HS Students (37)	20	13	4
LS Students (29)	9	13	7

Reading Monitoring. To explore whether and how students recognized and monitored their reading processes while reading, after they had finished reading, students were asked to answer a question about monitoring. Here, there was a marked difference between the two groups: more than two third of the HS students (25) reported that they monitored their reading processes, but only around a fifth of the LS students (6) reported that they did so.

Among the HS students who said they monitored their reading, almost all monitored what they were getting from their reading by asking themselves about what they had just read and by answering these questions to check whether they understood what they were reading or not (e.g., “I monitored what I was reading, and I monitored it by asking myself questions about what I had just read.”). If they were having issues in comprehending the text, they went back and re-read the text (e.g., “I would read, then pause to see if I was understanding, if not I would re-read.”). One interesting response was that a student commented that “I checked my motivation on reading the text. I checked this by re-reading the section whenever I didn’t feel motivated on reading it.” This is crucial, since it confirms that students will check or monitor their motivational

status as well as their cognitive process when reading. Although there were some LS students who reported that they monitored their reading, their responses were not specific, or they just said they re-read the text.

From these findings, three points should be noted. First, students might not have recognized their monitoring processes while reading since they happen unconsciously. Second, the LS students seemed either to not recognize these monitoring processes or employed them less effectively. Third, motivational status can and should also be monitored during reading. These findings imply that modeling how to monitor cognitive and motivational aspects in reading may be beneficial for students to help them manage their reading.

Reading Efficacy

Students were asked to respond to the question of whether they could read and understand the historical text. As before, students were asked to rate the extent to which they could read and understand the text using a 5-point scale before explaining why they chose the score on the scale that they did. The mean scores showed once again descriptively different trends for the reading achievement levels, with mean scores for the HS and LS students of 4.3 and 3.5, respectively. This indicates that the HS students were more likely to think that they comprehended the text well than the LS students, but the differences were not large. This may be either because the historical text was easy or because sometimes students overestimated their reading ability. Some of the students in both groups offered no reason to explain why they thought they could read the text; they simply reported that they would be able to read the text well after skimming the text.

However, many other students did explain why they thought they could read the text. For example, some students said their reading competence was based on their vocabulary knowledge. When students felt they knew most of the vocabulary used, they thought they could read the text (e.g., “I can understand the text because usually they use words in my vocab.”), but when they did not feel that they were sufficiently familiar with the vocabulary, they hesitated to say they could comprehend the text well. Another judgment criterion stated was whether they had prior knowledge related to the historical text. Some students said that having already learned that topic or seen the relevant readings affected their efficacy judgment (e.g., “I think I can understand the text because when I remember the main points I have learned then I know what the text is talking about.”). Also, according to some students, whether they knew appropriate reading strategies could affect their efficacy (e.g., “I think I can read the text well because I can summarize what I have read.”, “I can understand the text because I know how to read the text closely.”). That is, when they thought they had key reading skills such as summarizing or close reading, they believed that they could read the text more deeply. Additionally, a few students judged their competence in reading by considering the structure of the historical text and explaining that an explicit and non-complex text structure would help them understand the text.

As reported above, although many students across both groups simply said that they could read the text or did not give specific reasons, more HS students (18) could judge whether they would be able to read an assigned text or not by applying specific self-judgment criteria, when compared to LS students (9). This may suggest that although

the extent to which students can read a text according to each group is important, it is also critical for students to know why they make such judgements.

Reading Value

Students were asked to respond to a question about whether they thought reading the historical text was valuable. As before, students were first asked to rate the extent to which they agreed that reading the text was valuable using a 5-point scale and then to explain whether or not and why they think reading the text is important, useful, or enjoyable. Two different trends were again shown for the two reading achievement levels, with the HS and LS students having mean scores of 3.7 and 2.8, respectively. The HS students might think that reading the text was more valuable than the LS students.

Looking at the students' responses rather than their rating on the 5-point scale, the students' responses fall into three main categories: valuable, mixed, and none, as shown in Table 5.3. The 'valuable' category was further divided into four sub-categories: learning new knowledge on history; preparing for future texts, grades, college, and life; getting lessons for today; and being entertaining or interesting. Although there were differences in terms of frequency according to their reading achievement levels, students' responses across both groups were sorted by these categories.

Some students reported that reading the historical text was valuable because it enabled them to accumulate historical knowledge and better understand historical topics and events. Some students focused more on how reading the text affects their future, arguing that reading the text would help them get better grades and be more prepared for college, both of which are relevant to performance goal orientation (e.g., "I believe it is somewhat important because it is a part of our learning as students in high school and just

in school in general to know things from the history books. Being useful can be an importance because it's good to know these things in case you are tested later on in college or something."). Other students maintained that reading the historical text was valuable since people can learn how history happened and how history can affect what happens today (e.g., "I think it is important to understand our past and it can be useful when you look at and see what differences we have now.", "We get to learn why the world is the way that it is today and it is useful because we can use our worlds past to make the future a better one."), while a few students reported that since they were entertained by or interested in the information they acquired through reading the text, reading it was beneficial for them. However, some students had a more mixed perspective on the value of reading the history text, contending that it depended on reading topics or situations.

This suggests that students' reading value recognition is flexible rather than stable and can vary according to each reading topic and context. Interestingly, among the students who revealed a mixed stance, most of them distinguished importance/usefulness and enjoyment. That is, many students said that they felt that reading the text was useful or important, but they did not feel it was enjoyable, while others reported that they felt it was enjoyable, but they did not think it was important or useful. Although expectancy-value theory researchers argue that value consists of attainment value (importance), utility value (usefulness), and intrinsic value (enjoyment), the responses from these students indicated that intrinsic value may have more distinguishable attributes compared to either attainment value or utility value.

Table 5.3 shows the students' responses according to their reading achievement levels. Because of the limited number of participants, it is difficult to find clear tendencies or differences between the two groups, but based on the data collected, regardless of groups, students who considered reading the text to be valuable generally found their reading value came from acquiring new knowledge. More HS students had a positive sense of reading value in history, and none thought reading the historical text had no value. In contrast, more than half of the LS students expressed a mixed perspective or did not think reading the text was particularly valuable. The findings are summarized in Table 5.3. To compare overall differences, I tried to categorize the students' responses within the broad four themes, although there were a few responses that deviated the themes a bit.

Table 5.3 Comparison of Frequency on Reading Value

Group	Valuable				Mixed	None
	Learning new knowledge of history	Preparing for future tests, grades, college, and life	Getting lessons for the present	Feeling entertaining or interested		
HS Students (37)	10	8	6	4	9	-
LS Students (29)	6	3	3	2	10	5

Motivational Regulation

To investigate students' regulation of motivation while reading the text, students were first asked to rate the extent to which they agreed that they were fully motivated

while reading the text using the 5-point scale. And then, they were also asked to explain why they had trouble maintaining their motivation during reading and what they did to maintain or enhance their motivation for reading. The HS and LS students had mean scores of 3.7 and 2.7, respectively, which may indicate that the HS students tended to maintain their reading motivation better than the LS students. While there were a few HS students who reported that they were definitely able to maintain their motivation, none of the LS students reported that they were able to do so.

Reasons for Being Fully Motivated. The six students who said they did not have any trouble maintaining their concentration and motivation reported that it was possibly because there was no noise around them, they had an explicit goal that they wanted to accomplish quickly, or they had eliminated distractions that were harming their motivation in reading. Here, the most notable point is that in addition to setting reading goals at the outset, reminding themselves of their goals constantly while reading may be important to help students concentrate on their reading and maintain their reading motivation. This also demonstrates the intertwined relationship between reading goals and cognitive process or motivational status in reading. The students' responses also show that environmental structuring is important for maintaining reading motivation.

Reasons for Not Being Fully Motivated. Across the two groups, the reasons students gave to explain why they had difficulty maintaining their motivation while reading can be categorized in terms of five reasons. First, they said that reading the historical text was boring or it was not interesting (e.g., "Not all of it was interesting.", "Because I don't find history interesting."). While some said they do not like reading itself or reading historical texts, others said that they were not interested since the topic

was not intriguing (e.g., “I had trouble maintaining my concentration because I was not very interested in the topic.”) or the topic was already dealt with (e.g., “I lost interest in what I was reading and this happened because I have learned the topic before elsewhere, and I have learned about the Articles of Confederation and the Constitution in US History in 8th grade.”). These responses demonstrate that students’ interest in reading can be situation-specific or topic-specific rather than a stable reading stance that can be applied in most reading situations.

Second, some students reported that their environments negatively affected their efforts to maintain reading motivation. For example, some students said that having the TV on or their dog distracted them (e.g., “I had the T.V. on in the background and I was listening to what it said.”, “My dogs were going crazy.”). Third, students’ ability to maintain their motivation in reading was affected by the characteristics of the text. Some complained that since the text was complex and difficult, they had trouble maintaining their reading motivation (e.g., “It was a lot of information.”). This may be related to self-efficacy because complex and difficult texts can reduce students’ feeling of competence.

Fourth, students were not fully motivated while reading the text because they thought that the task was not important. For example, some students said that since the reading task did not seem important for their grades or success in school, they did not feel they needed to maintain their concentration and motivation. Finally, a few students reported that they had difficulty maintaining their motivation because they had difficulty comprehending and remembering the text because of their low reading ability (e.g., “I had difficulty maintaining my motivation since I didn’t understand the text with my lack of vocab knowledge.”).

As the data presented in Table 5.4 show, there did not appear to be any notable differences between the two groups. Students in both groups had difficulty maintaining their motivation while reading since reading the text was not interesting or it was boring. Next, while many HS students reported their environment as a reason for their problem with maintaining their motivation, many LS students reported that they simply did not feel the reading task was important for them. Environments are somewhat physically controllable but feeling a task as important requires students' inner regulation of motivation.

Table 5.4 Comparison of Frequency on Reasons for Reading Motivation Distraction

Group	Not Interesting / Boring	Environments	Text Complexity and Difficulty	Not Important	Low Reading Ability
HS students (31*)	11	10	6	3	1
LS students (29)	9	4	5	8	3

* Six students who reported that they were fully motivated were not included.

Ways to Maintain Reading Motivation. Researchers in the field of regulation of motivation have suggested a wide range of motivational strategies, but in this study, students largely used just six strategies to maintain or enhance their motivation while reading. First, students used goal-oriented self-talk in which they told themselves to reach various goals associated with completing the reading task. For example, students told themselves they should be motivated to finish the reading task sooner or to answer the given questions correctly (e.g., "I told myself the more you concentrate now, the sooner you'll get done.", "I read 3 paragraphs then I get a break, I say read.", "I just remembered

that this was a task and it needed to be done, and what usually keeps me motivated is if I need a good grade on something.").

Second, students focused on using comprehension strategies to maintain their motivation to read, re-reading, breaking down the text to aid comprehension, or reading the text aloud (e.g., "When I was not motivated, I went over what I just read and saw if it made sense to me and if it didn't then I read it again."). Third, students used an environmental structuring strategy, which decreases the possibility of off-task behavior by reducing the probability of encountering a distraction or by reducing the intensity of any distractions that do occur. For example, they turned off the TV or put their dog outside to make a quiet place to work.

Fourth, students used the efficacy self-talk strategy, where they told themselves they could read the text and to just keep reading (e.g., "I maintained my motivation by telling myself that I've been working on this now for the past five hours and I know how to read and I can get it done."). Fifth, students used the value enhancement strategy. Here, they tried to remind or reinforce the value of the reading task by focusing on how the task could be helpful for their learning or how it could be useful for their grade (e.g., "This is important to learn history and you have to do it."). Finally, students took a break or paused the reading task when they felt they were less motivated to read and came back to it later (e.g., " I took breaks between sections, processed what I could remember and then started the next one.").

As the data presented in Table 5.5 demonstrate, there did not seem to be any compelling differences between the two groups. However, the HS students did seem to focus more on using the goal-oriented self-talk strategy, which implies that the HS

students maintained or enhanced their motivation by telling or reminding themselves of proximal goals or goals they have already set. In contrast, the LS students appeared to use comprehension strategies to maintain their reading motivation. Another notable point was that the LS students were apt to take a break or pause what they were reading instead of finding ways to increase their reading motivation immediately.

Table 5.5 Comparison of Frequency on Motivational Strategy Use

Group	Goal-oriented self-talk	Comprehension process	Environmental structuring	Efficacy self-talk	Value enhancement	Taking a break / pausing
HS students (31*)	11	8	7	2	3	.
LS students (29)	5	8	4	2	3	7

* Six students who reported that they were fully motivated were not included.

Results of Two-way ANOVA

One of the main objectives of this study was to explore the relationship between cognitive and motivation aspects in reading. As a proxy for the cognitive aspect in SE, items on cognitive regulation in reading were used in the reading questionnaire. As proxies for the motivational aspect in SE, items on reading value and regulation of motivation (reading value and mastery goal orientation) were used for the reading questionnaire. It should be noted that this analysis has limitations: the absolute participant numbers were small, the cognitive aspect was measured by one factor but the motivational aspect was measured by two, and the range of the dependent variable (CRI score) was not large (0-23).

For the grouping criteria, the mean of the sum of the construct of cognitive regulation in reading and the mean of the sum of the constructs of reading value and motivational regulation were used. The student participants were therefore assigned to one of four groups: high cognitive/motivational, high cognitive/low motivational, low cognitive/high motivational, and low cognitive/motivational.

Assessing the Questionnaire Items

Since these factors were hypothesized as proxies for SE by adapting the existing questionnaire items, the first step was to conduct a Confirmatory Factor Analysis (CFA). To improve the model fit, three items that were derived from other items to a greater or lesser extent were deleted by considering standardized estimates. Specifically, items 2, 9, and 12 were deleted from the initial questionnaire (Appendix B) leaving a total of 16 items in the final version. Some relevant indexes from CFA results showed that overall the final version questionnaire with 16 items was acceptable (Table 5.6).

Table 5.6 Relevant Results from CFA Analysis

Index	Result	Criteria for good fit
Comparative fit index (CFI)	.90	≥ .9
Root-mean-square residual (SRMR)	.05	≤ .08
Root-mean-square error of approximation (RMSEA)	.11	≤ .06 (depending on sample size)

Specifically, the result of the CFA showed a .90 CFI, with .05 for SRMR, and .11 for RMSEA. Regarding CFI, although a good model should be higher than .95 (Hu &

Bentler, 1999), .9 does demonstrate a relatively good fit (Marsh et al., 2004). For SRMR, Hu and Bentler (1999) recommended a value below .08. For RMSEA, a cutoff value close to .06 is required for a relatively good fit but in small samples the RMSEA does tend to overreject the true model, which means that the value obtained is too large for the purposes (Hu & Bentler, 1999). Based on these results, it was judged that overall the adjusted reading questionnaire can be subjected to an ANOVA analysis.

Testing Assumption

In terms of the testing assumptions for the two-way ANOVA, although the sample size was small, it did not appear that there were extreme violations. Specifically, when testing the assumption of homogeneity of variance using Levene's test, the difference was not statistically significant [$F(3, 62) = 5.275$, $p = .09$], which means the data do not violate the assumption. None of the groups had a skewness statistic with an absolute value greater than 1, and there were no extreme outliers, which means this should not produce a large inflation in the Type I Error rate. Thus, the ANOVA was employed.

Results of ANOVA

Based on the proxies for the SE components, a two- way ANOVA of 2 (Cognitive aspect in reading: low vs. high) × 2 (Motivational aspect in reading: low vs. high) was performed. The results showed the F-statistic to be statistically significant [$F(3, 62) = 12.16$, $p<.001$], which means that at least one group mean is different than the others in the population. As seen in Table 5.7 and Figure 5.2, both of the main effects were statistically significant, confirming that students' cognitive regulation in reading and their

motivational recognition or regulation on reading value/goal were important for their reading achievement. However, the interaction effect was not statistically significant.

Table 5.7 Statistical Results

Group	Number	Mean	Standard error
Cog-High/Mot-High	25	16.84	0.69
Cog-Low/Mot-High	8	15.88	1.23
Cog-High/Mot-Low	9	14.22	1.16
Cog-Low/Mot-low	24	11.00	0.71
Main effects	F	*p*	
Cog-aspect	4.56	.037	
Mot-aspect	14.57	<.001	
Interaction	F	*p*	
Cognitive × Motivational	1.32	.255	

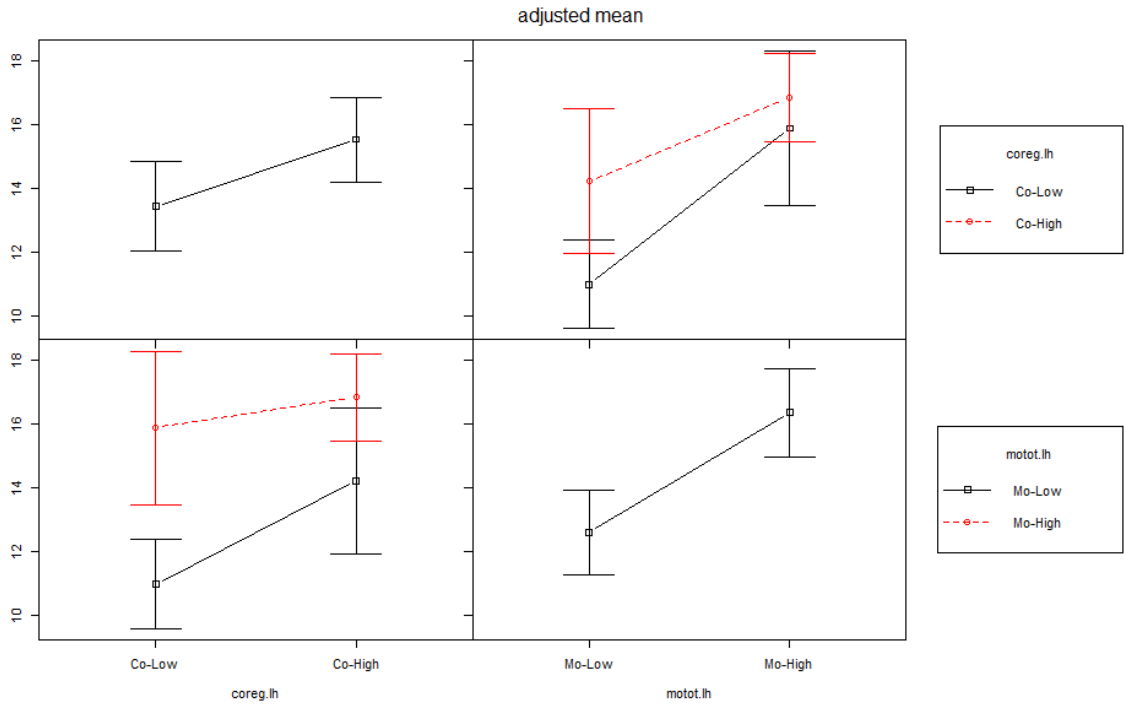

Figure 5.2 Group Plots with 95% Confidence Intervals

To test the difference among each pair of means, I conducted pairwise comparisons using t-tests by the Benjamini-Hochberg method. Table 5.8 shows a statistical comparison of the four groups of high cognitive/motivational, high cognitive/low motivational, low cognitive/high motivational, and low cognitive/motivational groups. There were statistically significant differences at the .05 α level between the Cog-High/Mot-High and Cog-Low/Mot-Low groups, between the Cog-High/Mot-Low and Cog-Low/Mot-Low groups, and between the Cog-Low/Mot-High and Cog-Low/Mot-Low groups. These results may confirm that SE components can function as elements that may enhance students' reading achievement. Also, as expected, students who had high levels of cognitive and motivational aspects in reading showed the highest achievement, while students who had low levels in cognitive and motivational aspects in reading showed the lowest achievement. Another interesting point is that many

students tended to show high or low levels in both the cognitive and motivational aspects in reading rather than showing mixed tendencies.

Table 5.8 p-values by Pairwise Comparisons Among the Four Groups

	Cog-High/Mot-High	Cog-High/Mot-Low	Cog-Low/Mot-High
Cog-High/Mot-Low	.087	.	.
Cog-Low/Mot-High	.498	.399	.
Cog-Low/Mot-low	<.001	.042	<.001

Discussion and Implications

In this study, I explored how the SE components work in identifying and assessing students' reading engagement, with pre- and post-task questions. The students' responses to the questions appeared to confirm that the SE components and identified or assessed the students' reading engagement tendencies or levels well. The students' responses showed that those components explicitly reflect the differential trends and they should be taught by teachers to improve their students' levels of reading engagement. Of course, it is difficult to generalize these findings across educational settings due to the small number of participants.

From the pre- and post-task questions, students showed both generic and discipline-specific/situation-specific engagement tendencies simultaneously. Although many studies on disciplinary literacy strategies have been conducted, the corpus of existing research does not include studies whose primary focus is on discipline-specific motivation. This study supports the efficacy of teaching specific motivation components in individual disciplines, as well as teaching generic motivational indicators. It is likely

that existing decontextualized survey-based instruments that measure students' stable or typical engagement tendencies might not capture students' comprehensive motivation and engagement. The methods used in this study to explore students' engagement may be a good option for investigating students' discipline-specific or context-specific engagement.

The results of the ANOVA showed that SE components can be useful educational elements to support students' reading achievement and that both cognitive and motivational aspects in reading should be emphasized concurrently. The caveat is that the questionnaire items utilized were proxies since they were SE components adapted from existing instruments rather than from more sophisticated newly created items. Specifically, these results show that students' recognition of reading task value and the motivational regulation strategies they adopt based on task value and goal orientation can be important ways to enhance reading engagement and achievement.

The students' responses regarding setting or defining reading goals showed that students often have difficulty in judging and deciding whether they should set reading goals and to what extent they should set goals. Considering that readers' goals for reading can affect comprehension processes such as inference generation, strategy use for integrating information from texts, and reading time (van den Broek et al., 2011), teachers should explicitly discuss both macro and micro reading goals with their students (Paulson & Bauer, 2011).

In particular, teachers should help students clarify what the goal for each reading is and, through discussion, why that goal is useful. Teachers should take every opportunity (e.g., goal conferences and progress conferences) to make sure that the

reading goals they set meet the necessary criteria. They should determine which goal(s) should be targeted first and identify difficulties, provide support, and keep track of progress, and revise or update reading goals (Cabral-Márquez, 2015). These guidelines show that teachers need to intervene and help their students develop effective goal setting strategies until their students can set realistic goals for themselves (Schunk, 2003). Above all, although making clear the order between reading motivation and reading goal setting should be demonstrated more, considering that some students responded that they did not set any reading goals because they were not motivated to read, teachers should do their utmost to activate students' reading motivation when teaching, providing, or discussing reading goals, which is one of the main ideas of the SE framework.

Also, as already reported, a few students reported that constant reminders of their reading goals were helpful in maintaining their concentration and motivation to read. This illustrates how students should keep their goals in mind and that teachers should help their students internalize good reading habits to remind or reinforce their goals while reading. Sometimes students get distracted and drift into reading texts purposelessly, so teachers should regularly set aside time to set, discuss, and remind students of their reading goals.

Many of the LS students reported that they did not monitor their reading processes while reading. Although it is not clear if they actually did not monitor their reading processes or if they just did not recognize the monitoring because it occurred unconsciously, the point is that teachers need to model ways to monitor reading processes and provide opportunities or times to help students reflect on their reading process in pre-, during- and after-reading activities.

One student reported that he considered and monitored his motivational status. In many cases, teachers view students' reading motivation as stable and assume that it can be maintained at least while reading, but this student's response demonstrates that reading motivation is flexible and changeable moment by moment (Guthrie & Wigfield, 2000; Unrau & Quirk, 2014) so it should be also monitored, maintained, or enhanced by meta-motivation or motivational regulation (Miele & Scholer, 2018; Scholer et al., 2018; Wolters, 2011). Ways to teach or support students' motivation from the perspective of motivation of regulation or meta-motivational monitoring should also be studied (Wolters, 2003), possibly by encouraging teachers to model ways to regulate reading motivation or to have classroom discussions to help students recognize their motivational regulation.

In this study, many of the LS students made no explicit efforts to maintain their motivation while reading the text. Instead, they reported that they just focused on what they were reading. If they attempted to concentrate on cognitive processes to maintain their motivation, that may be crucial evidence for the direct relationship between motivational and cognitive regulation. Future studies could explore in more detail how students deal with their motivation during a reading task. In terms of task value and its regulation, ways to activate or regulate value recognition should also be discussed. Considering that many of the LS students did not recognize the reading task as valuable, teachers need to find ways to help students recognize the benefits of reading a text to enhance their engagement and increase their conceptual comprehension of the text compared with no-rationale groups (Jang, 2008; Reeve et al., 2002). Further, students

may need to learn how to regulate their reading value recognition, which can be guided by teachers.

Teachers also need to pay attention to responses of some students that showed their lack of interest in reading the text and their difficulty understanding the text because of its difficulty. These issues can be dealt with from the perspective of text accessibility, which means making a text available and is defined as "more like leveling, based on a range of factors including text difficulty, but also considering how difficulty can be mediated by interest, stance toward a topic, and determination and perseverance to read something one has decided to read" (O'Brien & Dillon, 2014, p. 52). Thus, by adopting the perspective of text accessibility and making text more reader-friendly, teachers can find ways to enhance their students' motivation and understanding.

Finally, it should be noted that the quantitative results indicated no significant statistical difference between the students who had high levels in both cognitive and motivational aspects in reading and the students who had mixed levels in cognitive and motivational aspects. This may be because this study was based on a relatively small sample. Future studies with more participants will be able to investigate the differences among the groups in more detail.

Conclusion

This study explored how SE components work to identify and assess students' reading engagement and how these can function as elements to enhance reading engagement. The study's findings demonstrate that once those components are supported, enhanced, or taught by teachers, students' reading engagement will be leveraged. Many reading motivation researchers argue that teachers should provide a range of text options

in terms of text level and text format, although this is often not straightforward. In many cases, teachers could have difficulty providing a range of options and so students will inevitably encounter situations in which they have to read given texts. This is a key question: how can we engage students in a targeted text when that text is assigned as necessary or contains concepts that other more accessible texts do not? In this context, SE components may be beneficial since they focus on ways to enhance students' engagement in learning targeted texts with their parallel emphasis on cognitive regulation in reading.

Of course, specific instructional models based on these SE components have yet to be developed. In such a model, it will be important to include a series of stepwise instructional practices that reflect these paralleled cognitive and motivational elements (e.g., Appendix C). In particular, the model needs to clarify how instructors can teach or model what students should do to regulate their reading motivation. Also, from the perspective of disciplinary literacy, this model should emphasize the importance of discipline-specific literacy skills and motivation. Once an effective instructional model based on SE components has been developed, it will help teachers to engage students in reading by considering both the cognitive and affective aspects and by making engagement more explicit in teaching reading.

CHAPTER 6: CONCLUSION AND SUGGESTION

Conclusion

In this dissertation research, I aimed to explore how reading motivation and engagement, as well as cognitive strategies, are embodied and supported by teachers in the design and implementation of a discipline-specific planning and instruction in social studies classes. This research also aimed to explore how the SE components can work for students' reading engagement and achievement in a discipline. To achieve this aim, through three studies, I focused on what perspectives social studies teachers have in terms of cognitive and motivational factors when implementing DL teaching, what a social studies teacher did to engage students in literacy, and how the SE components work in identifying and assessing students' engagement in reading in social studies class. These studies focused on investigating teachers' perspectives, and their instructional practices in supporting reading engagement. In this chapter, I summarize the major findings, discuss implications, and suggest directions for future studies.

Summary of Major Findings

The first study explored perspectives social studies teachers reveal in planning instruction and applying a disciplinary literacy approach in their classes. Specifically, I investigated how teacher discourse evidences the understanding of and importance of not only teaching disciplinary literacy but also engaging students in literacy and learning. From the analysis of the collaborative meeting conversation transcripts and interview data, three salient coding themes emerged: text use, cognitive instructional practice, and motivation-enhancing practice.

More specifically, in terms of texts, teachers expressed that using multiple texts with attentive selection provides diverse perspectives and supports the various ways in which students read and learn. Also, while the teachers acknowledged that multimodal texts can be engaging, they also recognized that these texts still require guidance and support to make the texts more accessible for students. With regard to instructional practice, as reported, the teachers revealed three perspectives: (a) DL and thinking skills are their teaching goals; (b) reading skills should be included purposefully according to texts or units; and (c) writing is a good representation of students' disciplinary thinking skills. In terms of motivation-enhancing practice, teachers expressed that recognizing and enhancing both generic and discipline-specific motivation should be considered.

In the second study, I used mainly observational data to explore a case of a social studies teacher embodying her instructional practices to motivate and engage students in disciplinary literacy learning through an in-depth analysis of field notes and class artifacts. This study was explored through general reading engagement perspective and the strategic engagement (SE) framework in reading (O'Brien &Dillon, 2014). This study clarified how much the teacher focuses on enhancing student motivation and engagement, and whether and how the SE framework could be implemented to engage students as part of disciplinary literacy instruction in an instructional unit. More specifically, the first theme, teacher-led practice, was made up of four sub-themes that I discuss below.

First, to motivate and engage students in DL or learning, the teacher consistently presented learning goals to support students in focusing on what they would be reading, writing, or seeing in that class; and she did a preparatory activity to lead students to retrieve what they had already read or written to help them build upon what they had

already learned. Close reading with read-aloud sessions motivated the students to concentrate on reading the given texts carefully. Teacher-generated questioning helped the students focus on the class reading materials or listen to the teacher's explanations.

The second theme, multimodal material use, comprises three sub-themes. In this unit, Dawn used multimodal materials frequently. In addition to using multimodal materials for students' learning, she used multimodal materials as teaching tools to convey the teaching content more vividly. Dawn also made texts accessible by adapting some texts and including key notes, questions, and especially images

The third theme, student-centered activity, incorporated three sub-themes: (a) Hands-on activities enabled students to experience physically enjoyable activity and also motivated them to read texts to finish each activity; (b) Group discussion led students to look for, read, and refer back to what they had already read or learned; and (c) making students self-select their topic for various writing tasks motivated students to read and write.

In the third study, I explored how teachers should assess students' motivation and engagement related to reading in a discipline and how useful the SE components are in enhancing students' reading engagement and achievement. This was demonstrated by how students respond to SE components when reading a discipline-specific text and responding to the open-ended and questionnaire items.

Specifically, students responded to the questions based on 5 SE components—goal, self-efficacy, value, cognitive regulation, and motivational regulation in reading. The results showed that those components were correlated to and predicted students' reading performances according to their reading achievement levels. The HS students set

more specific goals to monitor their reading processes in terms of both cognitive and motivational regulation and to recognize their self-efficacy in reading and the value of the reading task. That means, those components can function as teaching elements to enhance students' reading engagement. It should be also noted that with the scenario-based survey including pre- and post-task questions, students revealed discipline-specific as well as generic responses.

Implications

As summarized above, the findings from all of the three studies are significant. And they have instructional implications. The first study demonstrated that the teachers who incorporated the DL approach focused more on instructional practices through cognitive strategies and text use. They also discussed discipline-specific and generic motivation and engagement, but the weight of emphasizing motivation and engagement was definitely less than teaching literacy and learning strategies. Further, their concerns about motivation and engagement were broad—that their foci were more on general history learning rather than DL. It demonstrates that teachers may overlook the importance of making motivation and engagement more explicit for teaching literacy in their classes and it implies that teachers may need guidelines to teach, support, or enhance students' motivation as well as cognitive strategies.

In the second study, I showed that the teachers employed a range of instructional practices to engage students in literacy. However, I pointed out that most of the practices focused on students' cognitive engagement dimension rather than considering harmoniously other dimensions such as affective or social dimensions. Also, since most of the teaching and learning were based on general literacy skills rather than DL, it was

difficult to isolate discipline-specific instructional practices for enhancing DL learning. Even in the DL-based activities, the ways to enhance students' motivation and engagement were not unique, which implies that to enhance student engagement in DL learning, teachers may need to consider how and to what extent the existing well-known motivating practices should be used rather than considering new motivating practices. Finally, according to the SE framework, teachers should consider all of the components of reading goals, values, and cognitive and motivational strategies employed for each reading to enhance student's reading engagement. But in this study, the teacher did not engage in these motivational strategies without specific guidance. The study inferred that the SE framework may be beneficial for teachers to engage students in purposeful reading.

The third study demonstrated that the SE components proved to be valid correlates of the performance of the HS and LS students. Hence, the scenario-based survey may be more helpful for teachers to assess students' generic and discipline-specific motivation and engagement than decontextualized, more generic instruments. Although some of the HS students were not at all proficient in some of the SE components, the findings revealed that when those elements for reading engagement are supported or enhanced, students' reading achievement will be increased. In particular, the study showed that students need to recognize, monitor, and reinforce reading value and motivational status—factors that have been overlooked when motivating students to read.

In summary, these implications show that since teachers tend to overlook the parallel importance of teaching cognitive and motivational strategies and emphasizing reading goals and value for each reading, there should be a more specific instructional

model based on the SE components. Thus, based on the findings in this research and the key notions of the SE framework (O'Brien & Dillon, 2014), the stepwise instructional model is suggested in the Appendix C.

Future Directions

As already discussed in the discussion section in each chapter, there are some future directions from the three studies. First, other studies should be accumulated to see if there are discipline-specific instructional practices to enhance student engagement in reading and if so, how those should be operated in class. Many educators agree that there are ways to teach discipline-specific cognitive strategies in literacy, but the first and second studies showed that there might not be discipline-specific instructional practices to enhance student engagement, which are distinguished from general practices across content areas.

Second, in engaging students in reading, teachers need to consider diverse engagement dimensions. As already noted, the teachers tended to focus on engaging students in literacy in terms of cognitive dimensions. Although it may be because the teachers are high school teachers who should teach the given high-level learning content with the given curriculum and time, they need to find ways to enhance more students' affective and social engagement dimension. Otherwise, that means that researchers should develop models or guidelines for teachers.

Third, considering that the teachers tended to focus only on cognitive aspects or to deal with either cognitive or motivational aspects separately, there should be specific stepwise guidance or instructional models (e.g., Appendix C) to involve both of the aspects at the same time. In this way, the instructional model based on the SE framework

can work efficiently, but there should be empirical studies on how that model works in real class and how much efficient it is. In particular, it can be also explored about which challenges teachers encounter in applying the model to their classes. These studies will modify and finalize the suggested SE-based model that can work across content areas.

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Appendix A. Content Reading Inventory and Situation-Specific Survey

This task consists of three parts as shown below. Please follow the instructions for each part.
Part I: Pre-task Motivation Questions
Part II: Reading Passage Questions
Part III: Post-task Motivation Questions

Part I: Pre-task Motivation Questions

Directions: Please look through Part II (Reading task). Skim through the text and the questions to get an idea about what you are required to do in that task. Do not read it yet. After your look over the text and questions in Part II do the questions below.

1. Please pick one of these which is most similar to you: When I read a text like the one in Part II, I

5	always have specific goals for my historical reading.
4	often have specific goals for my historical reading.
3	sometimes specific goals for my historical reading.
2	have some goals for my historical reading, but the goals are not clear.
1	don't have any goals for my historical reading of the text.

Below, explain why you answered the way you did in item 1. That, if you have goals, 1) what are those and 2) how do you know if you have met them? If not, explain why you do not set reading goals.

_____

_____

2. Please pick one of these which is most similar to you. When I read a text like the one in Part II, I

5	always try to connect what I already know to the text
4	often try to connect what I already know to the text
3	sometimes try to connect what I already know to the text
2	seldom try to connect what I already know to the text.
1	almost never connect what I know to the text.

Below, explain why you answered item 2 the way you did. That is, if you try to connect a text to what you already know, how do you do that? If not, explain why you do not connect what you know to the text.

_____

_____

3. Please pick one of these which is most similar to you. When I read a text like the one in Part II, I:

5	always have a specific plan for how to read the text and can see how the plan would definitely help me understand the text.

4	usually have a general plan for how to read texts like the one in Part II.
3	sometimes have a plan for how to read a text like the one Part II.
2	rarely have a plan for how to read texts like the one in Part II.
1	don't have a particular plan to help me understand the text in Part II.

Below, explain why you answered item 3 the way you did. That is, if you plan, how do you plan? If you don't plan, explain why.

_____

_____

4. Please pick one of these which is most similar to you. When I read a text like the one in Part II, I:

5	think I can fully read and understand the text.
4	think I can read and understand most of the text.
3	think I can read and understand some of the text.
2	think I can read and understand a little bit of the text.
1	don't think I can read and understand the text.

Below, explain why you answered item 4 the way you did. Explain why you think you can understand the text. If not, explain why you think you cannot understand the text.

_____

_____

5. Please pick one of these which is most similar to you. When I read a text like the one in Part II, I believe that:

5	Reading the historical text like the one in Part II is definitely important/useful/enjoyable to me.
4	Reading the historical text like the one in Part II is important/useful/enjoyable to me.
3	Reading the historical text like the one in Part II is somewhat important/useful/enjoyable to me.
2	Reading the historical text like the one in Part II is seldom important/useful/enjoyable to me.
1	Reading the historical text like the one in Part II is not at all important/useful/enjoyable to me.

Below, explain why you answered item 5 the way you did. That is, explain why you think reading the text is important, useful, or enjoyable to you.

_____

_____

6. Please pick one of these which is most similar to you. When I read a text like the one in Part II, I believe that:

5	I always feel interested in reading a historical text.
4	I often feel interested in reading a historical text.
3	I sometimes feel interested in reading a historical text.
2	I rarely feel interested in reading a historical text.
1	I don't feel interested in reading a historical text.

Below, explain why you answered item 5 the way you did. That is, explain why you think reading a historical text is interesting to you or not.

_____

_____

Part II: Reading Passage Question

Direction: Please read the following passage carefully and answer the questions that follow.

Articles of Confederation and Constitution

[1] While the state constitutions were being created, the Continental Congress continued to meet as a general political body. Despite being the central government, it was a loose confederation and most significant power was held by the individual states. By 1777 members of Congress realized that they should have some clearly written rules for how they were organized. As a result, the Articles of Confederation were drafted and passed by the Congress in November.

[2] This first national "constitution" for the United States was not particularly innovative, and mostly put into written form how the Congress had operated since 1775. Even though the Articles were rather modest in their proposals, they would not be ratified by all the states until 1781. Even this was accomplished largely because the dangers of war demanded greater cooperation.

[3] The purpose of the central government was clearly stated in the Articles. The Congress had control over diplomacy, printing money, resolving controversies between different states, and, most importantly, coordinating the war effort. The most important action of the Continental Congress was probably the creation and maintenance of the Continental Army. Even in this area, however, the central government's power was quite limited. While Congress could call on states to contribute specific resources and numbers of men for the army, it was not allowed to force states to obey the central government's request for aid.

[4] The organization of Congress itself demonstrates the primacy of state power. Each state had one vote. Nine out of thirteen states had to support a law for it to be enacted. Furthermore, any changes to the Articles themselves would require unanimous agreement. In the one-state**,** one-vote rule, state sovereignty was given a primary place even within the national government. Furthermore, the whole national government consisted entirely of the unicameral (one body) Congress with no executive and no judicial organizations.

[5] The national Congress' limited power was especially clear when it came to money issues. Not surprisingly, given that the Revolution's causes had centered on opposition to unfair taxes, the central government had no power to raise its own revenues through taxation. All it could do was request that the states give it the money necessary to run the government and wage the war. By 1780, with the outcome of the war still very much undecided, the central government had run out of money and was bankrupt. As a result, the paper money it issued was basically worthless.

[6] In 1788, the Constitution replaced the Articles of Confederation, greatly expanding the powers of the federal government. With its current 27 amendments, the U.S. Constitution remains the supreme law of the United States of America, allowing it to define, protect, and tax its citizenry. Its development and relatively quick ratification were perhaps just as much the result of widespread dissatisfaction with a weak federal government as it was support for the constitutional document.

[7] Federalists, those who identified with federalism as part of a movement, were the main supporters of the Constitution. They were aided by a federalist sentiment that had gained traction across many factions, uniting political figures. This does not mean there was no heated debate over the Constitution's drafting, however. The most zealous anti-federalists, loosely headed by Thomas Jefferson, fought against the Constitution's ratification, particularly those amendments which gave the federal government fiscal and monetary powers.

Vocabulary

1. Which word most closely means *confederation*? (refer to paragraph 1, line 2)

a. *Affiliation* b. *Configuration* c. *Complexion* d. *Dissociation*

2. Which word most closely means *controversy*? (refer to paragraph 3, line 2)

a. *Acceptance* b. *Compliance* c. *Disputation* d. *Unanimity*

3. Among the following vocabulary list (from paragraphs 6 and 7), which word means "the process of altering a law or document by parliamentary or constitutional procedure"?

Constitution, Article, Confederation, Amendment, Citizenry, Ratification, Document, Traction, Faction

_____.

Recall

4. Why were the Articles of Confederation written?

_____.

5. When were the Articles of Confederation ratified?

_____.

6. Based on the text above, what was considered the most important action of the Continental Congress?

_____.

7. How was the national government structured under the Articles?

_____.

8. How different were federalists and anti-federalists with regard to the constitution?

_____.

Inference

Instructions: For questions 9-11, first answer the question by selecting YES or NO. Then, in the space below each item, explain why you answered YES or NO. For questions 12 and 13 just answer each question in the space below each question.

9. Do you think that the one-state one-vote rule under the Articles enabled the emergence of federal authority?

Please answer YES or No, and explain your response.

YES / NO

_____.

10. Could the nation afford to have a passive central government in terms of revenue policies? Please answer YES or No, and explain your response.

YES / NO

_____.

11. Do you think that the Articles of Confederation were ratified because they were important in providing structure to govern the nation or were there other reasons? Please answer YES or No, and explain your response.

YES / NO

_____.

12. What was the fundamental issue of the debate on the constitution between federalists and anti-federalists?

_____.

13. Which political event reflected people's dissatisfaction with a weak federal government?

_____.

Part III: Post-task Questions

Direction: <u>After you finish the reading task</u>, please answer the questions below:

1. While reading the text, did you check or monitor how your reading was going? If so, 1) what did you monitor and 2) how did you monitor?

_____

_____

2. Please pick one of these which best describes your reading of the text in Part II.

5	I was able to definitely maintain my motivation when reading the text. (I was definitely motivated to read the text.)
4	I was able to maintain my motivation most of the time when reading the text. (I was motivated to read the text most of the time.)
3	I was able to maintain my motivation some of the time when reading the text. (I was motivated to read the text some of the time.)
2	I was able to maintain my motivation very little when reading the text. (I was motivated to read the text very little.)
1	I was not able to be motivated when reading the text. (I was not motivated to read the text.)

Below, give reasons 1) why you have (or had) trouble maintaining your motivation and 2) explain how you maintain(ed) your motivation.

_____

_____

Appendix B. Reading Questionnaire

Please complete the following items. Remember there are no right or wrong answers, just answer as accurately as possible. Use the scale below to answer the questions. If you think the statement is very true of you, circle 7; if a statement is not at all true of you, circle 1. Find the number that you think is most like you from 1 through 7 and circle the number.

1	2	3	4	5	6	7
Not at All True of Me						Very True of Me

1	When I read for this class, I set goals for myself to decide what strategies to use.	1	2	3	4	5	6	7
2	Before I read new reading material thoroughly, I often skim it to see how it is organized.	1	2	3	4	5	6	7
3	When I become confused when reading for this class, I try to figure out why and go back to solve the confusion.	1	2	3	4	5	6	7
4	If the reading materials in the class are hard to understand, I change the way I read.	1	2	3	4	5	6	7
5	I ask myself questions about the reading to make sure I understand the text I have been reading in this class.	1	2	3	4	5	6	7
6	When reading for this class, I try to figure out which concepts I don't understand well.	1	2	3	4	5	6	7
7	I think I will be able to use what I read in this class in other classes or in future classes that I might take.	1	2	3	4	5	6	7
8	It is important for me to read the reading material in this class.	1	2	3	4	5	6	7
9	I am very interested in reading the material for this class.	1	2	3	4	5	6	7
10	I think the reading material in this class helps me learn.	1	2	3	4	5	6	7
11	Understanding the reading content of this class is very important to me.	1	2	3	4	5	6	7

12	When I find myself less motivated in reading, I try to make the text seem more useful by relating it to what I want to do in my life.	1	2	3	4	5	6	7
13	When I find myself less motivated in reading, I make an effort to relate what I am reading to my personal interests.	1	2	3	4	5	6	7
14	When I find myself less motivated in reading, I tell myself that it is important to read the text because I will need it later in life.	1	2	3	4	5	6	7
15	When I find myself less motivated in reading, I try to make myself see how reading the text is personally relevant.	1	2	3	4	5	6	7
16	When I find myself less motivated in reading, I persuade myself to keep at it just to see how much I can learn.	1	2	3	4	5	6	7
17	When I find myself less motivated in reading, I tell myself that I should keep working just to learn as much as I can.	1	2	3	4	5	6	7
18	When I find myself less motivated in reading, I challenge myself to complete the work and learn as much as possible.	1	2	3	4	5	6	7
19	When I find myself less motivated in reading, I convince myself to work hard just for the sake of learning.	1	2	3	4	5	6	7

[This does not appear in the student questionnaire version. 1, 2, 3, 4, 5, 6: Cognitive regulation in Reading / 7, 8, 9, 10, 11: Task Value / 12, 13, 14, 15: Motivational regulation in Reading (Task value) / 16, 17, 18, 19: Motivational regulation in Reading (Mastery goal orientation)]

Appendix C. Instructional Model of Strategic Engagement Framework

To suggest an instructional model of SE framework, I give an overview of the SE again based on the core theories although it was already explained in chapter 2. For this, some parts were extracted from chapter 2. And then, I suggest a stepwise instructional model, Strategic Engagement Development.

Overview of Strategic Engagement Framework

As discussed, SE was introduced by O'Brien and Dillon (2014) to emphasize that engagement can be explicitly taught, modeled, practiced with guidance, and then independently used just like educators have done with cognitively based comprehension strategies over the last 35 years or so. Literacy educators and classroom teachers have taught students how to connect ideas to their background knowledge, monitor their comprehension, use fix-up strategies when they need them, and self-assess their success. I contend that explicit instruction focusing on motivation aspects of engagement can be equally successful. For example, SE can include taking a stance toward a topic (as explored in both print and multimodal text) that promotes personally relevant goals, emotional connections, and allows learners to assign value to learning about a topic. Once these components are made explicit, students can be taught to strategically monitor these toward self-regulation with the end goal of improving the experience of using multimodal texts to support understanding.

The framework emphasizes the parallel importance of cognitive strategies and motivation during reading. Thus, strategically engaged readers are expected to use appropriate strategies to monitor, control, and foster their cognitive processes and motivational status, concurrently. They are also aware of their reading goals as valuable

and related to their capability. Because reading goals and reading value may be reciprocal, readers can set reading goals and then elicit reading value, or they can self-generate or listen to reading value to set reading goals. Thus, in addition to teaching reading strategies, educators need to help students set reading goals and internalize reading values, which are connected to cognitive and motivational strategies while reading. In the meantime, teachers should help students recognize reading goals and reading tasks as important. Here, I emphasize that students are more active and subjective agents who can regulate their motivation based on their reading goals (see Figure 2.1).

When discussing the terms *strategy* and *strategic*, reading researchers tend to focus on cognitive aspects. For example, strategy is defined as "a mental routine or procedure for accomplishing a cognitive goal" (Dole, Nokes, & Drits, 2009, p. 348) or "a strategy is composed of cognitive operations over and above the processes that are natural consequences of carrying out the task … (strategies) achieve cognitive purposes … and are potentially conscious and controllable activities" (Pressley, Forrest-Pressley, Elliott-Faust, & Miller, 1985, p. 4). In addition, reading strategies, which are also based on cognitive aspects, refer to "deliberate goal-directed attempts to control and modify the reader's effort to decode text, understand the words, and construct meaning of text" (Afflerbach, Pearson, & Paris, 2008, p. 368).

However, with socio-cognitive and socio-cultural perspectives for learning (e.g., O'Brien & Rogers, 2015; Engeström, 1999; Lave & Wenger, 1991; Zimmerman & Cleary, 2009), I don't confine the term *strategy* to cognitive aspects, and rather employ it globally to include diverse cognitive, motivational and affective processes since learners can use strategies for motivational or affective regulation (Garcia & Pintrich, 1994; Miele

& Scholer, 2018; Op't Eynde, De Corte, & Verschaffel, 2007; Scholer et al. 2018; Wolters, 2003). Additionally, we fundamentally agree with Alexander, Graham, and Harris (1998) arguing that strategies have six attributes such as procedural, purposeful, effortful, willful, essential, and facilitative. Of course, we also believe that sometimes strategies for motivation and affect may be covered with or mediated by cognitive strategies, but sometimes they are manifested overtly, consciously, and intentionally.

To explain the SE that entails monitoring and control of strategies within and among cognitive and motivational aspects and goals, as already discussed, the SE is mainly based on self-efficacy, expectancy-value, and self -regulation theories. These theories are crucial for SE since SE begins with helping students recognize whether they can do the reading, whether they want to do the reading and why, and what they need to do to succeed in reading.

Reading Efficacy and Expectation

Self-efficacy is relevant to the question of *Can I do this?* Self-efficacy is defined as "the conviction that one can successfully execute the behavior required to produce the outcomes" (Bandura, 1977a, p. 79), and it affects or contributes to learning, motivation, and self-regulation (Bandura, 1989, 1993). Thus, it is hypothesized that students with higher self-efficacy should be more apt to choose challenging activities, expend more effort to succeed, and persist longer on difficult tasks.

An issue is the discrepancy between self-efficacy and actual performance. This issue is explained by the concept of calibration, which refers to "how well self-efficacy relates to actual performance on the corresponding tasks" (Schunk & Pajares, 2009). For example, when a student judges that she is capable of performing a task and then

performs it, or when she judges that she is incapable of performing it and cannot perform it, we can say that she is calibrated well because her self-efficacy predicts accurately her performance. This calibration is educationally important because students who overestimate their capabilities may sometimes fail and it leads to their motivation decrease, and so, to avoid this, teachers can provide information about required skills for the task (Schunk & Pajares, 2009).

Students who have expectancies for success and beliefs about ability often engage in thoughts and actions for doing or improving their reading, such as analyzing/setting reading goals, using reading strategies, and monitoring their reading comprehension processes. In turn, their self-efficacy beliefs are influenced by the results of their behaviors (e.g., achievement of the reading task) and environments (e.g., teachers' feedback). This competency belief influences readers' cognitive processes in reading. Specifically, students' reading skills and their competency beliefs are correlated (e.g., Morgan & Fuchs, 2007), and perceived reading self-efficacy predicts reading comprehension achievement (e.g., Solheim, 2011).

Reading Value

Expectancy-value theory is relevant to the question of *Do I want to do this activity, and why?* This theory is especially important for the SE framework in that the framework emphasizes maintaining and enhancing student value of reading. According to Wigfield et al. (2009), subjective value consists of four components. More specifically, attainment value means the importance of doing well on a given task and incorporates identity issues and is linked to the relevance of engaging in a task for confirming or disconfirming salient aspects of one's self-schema. Intrinsic value is similar to the

construct of intrinsic motivation, interest, and flow, which means the enjoyment one gains from doing the task. Utility value or usefulness is similar to extrinsic motivation, but also relates to an individual's internalized short- and long-term goals. It means how a task fits into an individual's future plan. Finally, cost means what the individual has to give up doing a task, and it is conceptualized in terms of value because all choices are assumed to have costs associated with them and one choice often eliminates other options.

Students' subjective task values predict intentions and/or actual performance and achievement (Durik et al., 2006; McGeown et al., 2015). In contrast, when students fail to value what they are asked to learn in school, the degree of student motivation to engage in the target learning activity significantly decreases (Wigfield et al., 2009). In this way, students need to recognize the value of reading or the value of their goals in reading by themselves or by teachers' support (Canning & Harackiewicz, 2015; Jang, 2008; Hulleman et al., 2010).

Self-regulation in Reading

Self-regulation is relevant to the question of *what do I need to do to succeed*? Self-regulation refers to "self-generated thoughts, feelings, and actions that are systematically designed to affect one's learning of knowledge and skills" (Schunk & Zimmerman, 2007, p. 8), and self-regulation, as more than a cognitive process, is important for individuals to be engaged strategically before, during, and after learning performance (Cleary & Zimmerman, 2012). Much research also demonstrates that students' efforts to stay focused on the learning task during the learning process are based on the self-regulation system at the level of volitional strategies (Boekaerts, 2007). In this

way, self-regulation is a useful concept to explore readers' strategic and spontaneous mental and affective processes.

There are many components in self-regulation processes, but a key variable is goal setting because it is involved across the different phases of self-regulation (Locke & Latham, 2002) and it "facilitates self-regulation in that the goal defines for the person what constitutes an acceptable level of performance" (Latham & Locke, 1991, p. 234). Goals direct attention and effort toward goal-relevant strategies and activities and away from goal-irrelevant activities, regulate individuals' efforts, affect persistence and monitoring of goal progress, and are strongly related to subsequent performances (Latham & Locke, 1991; Locke & Latham, 2006; Schunk, 2001). Also, goal commitment is facilitated when people recognize the goal attainment as important and they believe that they can attain the goal (Locke & Latham, 2002).

From the viewpoint of self-regulation in reading or self-regulated reading, readers must first set their own reading goals, then recognize their reading efficacy, and plan how to achieve those goals by considering text characteristics. During reading, they are persistent in attaining the self-set goals for understanding the text by monitoring and controlling their cognitive processes and motivational statuses with constant feedback. After that, readers judge whether their performance during reading satisfies their goals by using self-evaluations of comprehension and asking themselves review questions to ensure understanding. This judgement can in turn affect the initial phase again. As seen, goal setting represents a crucial part of self-regulated reading.

Beyond focusing on cognitive aspects in self-regulation, it is necessary to pay attention to self-regulation of motivation in that motivation is changeable moment by

moment (Guthrie & Wigfield, 2000; Unrau & Quirk, 2014). Many leading motivation studies capture readers' motivation at a moment in time rather than tracking it constantly or checking several times during a reading task. Readers will regulate their changeable motivational statuses or beliefs during a reading to pursue their reading goals or achievements, so it is necessary to examine how students identify, address, and regulate their dynamic motivation during learning tasks (Miele & Scholer, 2018; Scholer et al., 2018). Thus, readers should know how different motivational states will affect the performance of specific tasks and that the type, amount, strategies of motivation for the best goal outcomes can operate differently in each context, rather than exerting similar effects across tasks and contexts.

Instructional Model—Strategic Engagement Development

As argued, SE framework emphasizes the parallel importance of cognitive and affective aspects in reading. And those components for the parallel emphasis are based on the theories that discussed above. Here, I introduce and suggest an instructional model based on the SE framework, which I call Strategic Engagement Development (SED). That is, to develop or support students' strategic engagement in reading, teachers should help students monitor and regulate their goals, efficacy beliefs, values, cognitive and motivational status and strategies in reading. Simply speaking, teachers should consider cognitive and motivational aspects concurrently in teaching reading. The specific instructional ways to develop or support students' SE consist of five steps as shown in Table 1. In addition to describing each step, I will also provide practical examples in class.

Table 1. Five Instructional Phases for Strategic Engagement Development

Phase	Cognitive Aspect	Motivational Aspect
Activate	Goals Background knowledge	Task value Expectation for success (Self-efficacy)
Discuss	Actions to meet the goals General/Discipline-specific literacy strategies Fix-up strategies	Goal's attainability Ways to maintain/enhance motivation Autonomous actions with agency
Model	How to use specific reading strategies	How to maintain and enhance motivation
Reinforce	Cognitive reading strategies that students learned Importance of monitoring of reading strategies	Goal's clarity and value Motivation of controllability
Assess	Whether students reached the given or their own goals How appropriate reading strategies students used	How students coped with the less motivated status during reading How students' recognition of reading value and their own reading competence were changed

Parallel Steps of "Activate"

This phase is to make students ready for engaging in reading. Thus, teachers activate students' cognitive and motivational status or process by stimulating relevant elements.

Cognitive Aspect. When starting to teach a text, teachers should clarify what reading goals are to read the text. This is different from general learning targets or goals in class, so it has to be more reading-specific. To state the reading goals, teachers need to use the verb *can* rather than *has to* so that students feel that the reading task is more

efficacious, and they participate in the reading subjectively. Instead of setting reading goals by teachers, teachers can also allow students to set their goals in reading by themselves. After setting reading goals, teachers should have some opportunities to help students retrieve relevant background for the reading. For this, teachers can generate questions verbally, or can use other relevant texts, images, etc.

Motivational Aspect. In this initial step, teachers should help students recognize the value of the reading itself or the value of reading goals. For this, teachers can provide the value of reading directly by stating the rationale or usefulness of the reading. Or, teachers can also have some time in order for students to find the reading value by themselves. Additionally, at this step, teachers should know how and why this reading is feasible to students. That is, to avoid the situation in which students hesitate to read even before starting to read the text, teachers can explain how and why this text is selected or feasible for students.

Example in Class. Ms. Catherine is a social studies teacher who teaches U.S history. Today, she dealt with the topic of federalist and anti-federalist. To study the topic, she used several texts. Ms. Catherine first presented the reading goal, “I can comprehend the given texts to compare what perspectives people had on a Constitution.” And then, she had students think and write a slip about how the texts can be useful or relevant to their school and how the given reading goal is helpful for their learning. She also emphasized that the texts are relevant to what they already learned in their textbook so they can be understood by themselves or with the teacher’s guidance.

Parallel Steps of “Discuss”

Interaction with teachers or peers can be helpful for students to learn what they do not know. Also, through discussion, teachers can help students realize what is expected to be engaged in reading.

Cognitive Aspect. After setting or clarifying reading goals, teachers need to have students skim the text. Once students skim the text, teachers can have time to discuss with students or between students about what students should do to accomplish the reading goals. This includes literacy skills that students need to use and what they should do when encountering some issues in comprehending the text. In particular, if students have difficulty noticing the necessary strategies, teachers can suggest possible strategies and lead students to discuss the strategies.

Motivational Aspect. In the previous step, students realize that their reading goals or reading itself is valuable and that achieving them is feasible. To reinforce their mind, teachers may lead students to discuss why the goal is attainable and valuable with their peers or teachers. Also, in this step, teachers should also discuss how students will cope when they have difficulty concentrating on reading the text because their reading motivation is changed while reading. Another point is to let students recognize that they are agentic readers who choose what they do for reading. Thus, students are allowed to choose and use diverse strategies such as jotting something down when necessary where they need. These discussions can help students realize that subjects of monitoring and regulation of motivation are themselves with recognition of their online or recursive agency.

Example in Class. After having students skim the texts, Ms. Catherine had students think of what reading strategies should be used and which specific reading plan

should be performed with emphasis that they can choose their strategies and plans autonomously. However, since some students had difficulty thinking of necessary reading strategies, Ms. Catherine let the students know that sourcing or contextualization should be used to read the multiple texts. She also explained more deeply the sourcing and contextualization because students were not still familiar with those skills. After that, she had some time to have students discuss and share why reading the texts is valuable for them and what they will do when they have difficulty concentrating on reading the texts while reading because their motivation is reduced. In addition to the discussions between students, Ms. Catherine added additional rationale of reading and learning the texts by saying the students will be able to know the importance of laws and government and also to learn a lesson why people should participate in discussion for national policies.

Parallel Steps of "Model"

Students may have difficulty what to do to be engaged in reading cognitively and motivationally. By being a model, teachers can exemplify and clarify what is expected for students to do.

Cognitive Aspect. As many educators agree, students may have difficulty applying the literacy strategies that they know or learned to when reading the text. Students may also have trouble how to monitor and regulate their reading strategies. For these situations, teachers can show how to use, monitor, and regulate literacy strategies by explaining their reading processes in detail or by using think-aloud to show their real processes in reading.

Motivational Aspect. When teachers model how to use reading strategies, in most cases, they focus only on cognitive aspects. However, considering that students may

have experience in which their motivation is reduced due to diverse reasons, teachers need to show how to maintain or enhance their motivation while reading to continue their reading. Like the case of cognitive aspect, teachers can show how to use, monitor, and regulate motivational strategies by explaining their reading processes in detail or by using think-aloud to show their real motivational processes in reading. Considering the SED components, teachers can model how to enhance their motivation by using goal-oriented or efficacy self-talk or by showing how they remind or reinforce the value of reading.

Example in Class. Since most of her students still had difficulty understanding the disciplinary literacy skills such as sourcing and contextualization, Ms. Catherine modeled how those strategies can be used in reading the multiple texts. By reading aloud and using think-aloud for a couple of paragraphs, she showed students about how she investigated authors' credentials and interest, and the position they take on the topics they narrate. Also, by using the given multiple texts, she also showed how to compare multiple documents to check the perspectives of federalists and anti-federalists. This think-aloud included her meta-motivational processes as well as meta-cognitive processes while using the reading strategies. Specifically, she revealed lack of motivation due to the text complexity, right after, she showed how she regulated her reading motivation through self-talk, "I can and should understand these texts because I want to show students about how sourcing and contextualization work." After the modeling, she emphasized that what she showed was just one of the examples, so students can employ different ways to reach the goals with their autonomy.

Parallel Steps of "Reinforce"

Students may lose track of what they should do to engage in reading. In this phase, teachers can remind students of what they learned and what they can use to engage in reading.

Cognitive Aspect. Discussing or modeling what to do with strategies might not be sufficient for students to internalize how to use reading strategies. That's why teachers need to remind or reinforce students of cognitive reading strategies that students learned and the importance of monitoring of reading strategies. While students read the text, teachers can emphasize again the reading strategies or the importance of monitoring the process especially when students are struggling with reading the text. These can be reinforced while teachers read and teach the text line by line in the whole class, or when students have trouble with it individually.

Motivational Aspect. For the same reason above, teachers need to remind students of how to maintain or enhance their motivation in reading. In particular, some of the students may have trouble with maintaining their motivation while reading because of diverse reasons such as uninteresting topics or text difficulty. For these cases, teachers should remind them of how to monitor their motivational status and regulate it. Specifically, teachers should let students realize again that their reading goals are clear and valuable and that they are subjects to control over their motivation. By doing this, students are expected to use motivational strategies when they find themselves less motivated in reading.

Example in Class. After modeling how to use cognitive and motivational strategies, Ms. Catherine had students read the texts individually or with their peers. When she found some students, who did not concentrate on reading the texts while

getting around and checking students' reading in class, she asked them what made them not concentrate on reading. Depending on students' responses, Ms. Catherine reminded them of what they learned about how to source and contextualize the texts or of how the reading goal is useful or important and how they can regulate their motivation.

Parallel Steps of "Assess"

By having time to assess, students can reflect on their problems while reading. Also, it helps students self-correct the problems, which leads to better engagement in future reading.

Cognitive Aspect. In addition to reading processes while reading, it is crucial to self-assess how the processes went. After the reading task, teachers should have some time to have students evaluate whether they reached the given or self-set reading goals and how appropriate reading strategies they used while reading. Once students assess their reading, teachers can have some discussion time to share where students had difficulty in applying or monitoring their reading strategies. It will enable students to feel that their peers may also have difficulty reading texts, which leads them to avoid underestimating their reading ability and to maintain their reading efficacy for future reading.

Motivational Aspect. In addition to self-evaluating their cognitive reading processes, students need to have some time to reflect on how they coped with when they were less motivated during reading or how they could maintain their reading motivation or concentration. These reflections will also enable students to assess whether they recognized the reading value and efficacy constantly and whether those were changed through this reading. Like above, by having some discussion time to share their

reflections on motivational aspects during reading, students will be able to not only feel that others also may face similar troubles with regard to motivation but also gain ideas of how they should deal with the motivational issues for future reading. These self-assessments enable students to recognize that they are agents who monitor and regulate all of the processes in reading.

Example in Class. Before checking and summarizing the reading content itself, Ms. Catherine had students reflect on their reading in terms of accomplishing the given reading goal, "I can comprehend the given texts to compare what perspectives people had on a Constitution." By using sourcing and contextualization. Students also expected to reflect on how they dealt with when they found they were not motivated to read while reading. By giving some time to share their reflection, Ms. Catherine had students recognize and realize peers' diverse difficulties and their management.

Conclusion of SED

In many classes, many teachers tend to focus on separately teaching cognitive comprehension skills, building environmental elements to enhance students' engagement, or structuring learning environments to make reading tasks and domains more enacting. Furthermore, teachers are apt to overlook how students monitor and address their own motivational problems during and for reading. However, in the fictional examples, Ms. Catherine tried to concurrently emphasize cognitive and motivational processes and statuses. Following what Ms. Catherine emphasized and taught, students are expected to recognize clearly reading goals and values from the reading texts and monitor and control their cognitive and motivational processes at the same time. Also, they will self-assess their cognitive and motivational processes in reading after reading.

Considering that readers' motivation affects cognitive processes, we need to shift the perspective from viewing students as passive receivers whose motivation can be enhanced by external or environmental factors to treating students as active agents who assess and regulate their motivational orientations and states with appropriate strategies. I believe that this SED and fictional example will be helpful for teachers to design their classes for students' strategic engagement.