

Barriers to effective curriculum implementation

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ABSTRACT

An administration of a private school located in the south reported the problem of a lack of curriculum fidelity to a new phonics program, which created a need to identify barriers preventing full curriculum implementation. Using the concerns-based adoption model (CBAM) as the conceptual framework, this qualitative case study identified concerns and barriers teachers report when implementing a new curriculum. Data were collected from 10 participants (8 teachers and 2 administrators) through a questionnaire, interviews, and observations. Participants were interviewed to identify any barriers experienced with curriculum fidelity of a new phonics program. Teachers were observed to determine which components of the curriculum were present in or omitted from their lessons. Participants completed a questionnaire to determine their levels of concern when asked to implement a new curriculum. Results indicated that teachers required additional information before the expected implementations occur and an understanding of demands on their personal time. Common themes showed a desire for professional development (PD), peer-collaboration, and access to curriculum resources, which served as the basis for the project. The resulting project integrated PD to address concerns connected to reoccurring themes. Implications for social change include change at a systematic level by providing administrators with data to support teachers during curriculum changes and substantiation for the benefits of understanding concerns prior to a change for improving curriculum fidelity.

Keywords: curriculum, fidelity, phonics, professional development, curriculum changes

INTRODUCTION

Both public and private schools in the United States continue to experience rapid and regular changes in their curricula (McShane & Eden, 2015; National Center for Education Statistics [NCES], 2017). These changes require teachers to possess the skills and knowledge to implement curricula with fidelity (Wiles & Bondi, 2014). Adopting new curricula requires teachers to feel confident in the delivery and purpose of the materials they use in order to ensure accurate implementation (American Institute for Research [AIR], 2016; Early, Rogge, & Deci, 2014). Identifying reasons that support or prevent teachers' effective implementation of a new curriculum may provide direction for helping them with curriculum changes. According to Lochner, Conrad, and Graham (2015), teachers are central to whether a curriculum is delivered consistently, effectively, and with efficacy to enable the support of student progress and growth.

In a study, the NCES (2017) conducted on curriculum fidelity and professional development, teachers self-reported fidelity rates when implementing an English language learner (ELL) program. The authors, who used a log to rate the level and amount of time spent on using the curriculum as prescribed, found that 16% of participants recorded decreased levels of fidelity, 51% recorded average levels of fidelity, and 30% recorded consistent fidelity of implementation, as prescribed by the curriculum developers. Previous researchers have shown a need to identify the factors that contribute to teacher concerns and which barriers prevent full curriculum implementation (Lochner et al., 2015). Understanding the barriers to complete implementation of a new curriculum could provide education administrators with tools to address teacher concerns and could provide vital training for successful implementation (AIR, 2016).

DEFINITION OF THE PROBLEM

The problem at Southwest Private School (SPS, a pseudonym) is that a new phonics-based curricular program is not being implemented with fidelity, according to the SPS principal (personal communication, May 23, 2016). Administrators have not acted to identify or understand the practices, concerns, and barriers to curriculum fidelity (SPS principal, personal communication, May 23, 2016). The existing gap in practice is that teachers are not implementing the curriculum faithfully; as a result, which concerns teachers report when implementing a new curriculum remain unknown. This gap extends to a lack of offerings for professional development (PD) and classroom observations to remedy the problem (SPS principal, personal communication, May 23, 2016). In general, implementing curricula consistently supports student growth of knowledge and academic preparedness for the next grade levels (Polikoff & Porter, 2014).

At SPS, however, the administration recently purchased a phonics curriculum, but the teachers have chosen not to implement it as directed, thus creating inconsistencies (SPS principal, personal communication, May 23, 2016). Teachers and parents have cited the lack of fidelity in curricular implementation as a contributing factor to the students' unpreparedness for the next grade levels, because the curriculum is no longer vertically aligned (SPS headmaster, personal communication, August 31, 2016). Vertical alignment has to do with similarities in instructional practices and the fidelity of curriculum use and implementation between previous and following grade levels (Wiles & Bondi, 2014). With teachers not faithfully implementing the curriculum, it is difficult to determine which objectives are taught before students enter the

next grade. A need exists to understand the reasons that either support or prevent teachers' faithful implementation of a new curriculum.

Concerns about the teachers' lack of curricular fidelity existed before the purchase of the new phonics curriculum at SPS. The curriculum purchase took place to help remedy the alignment concerns that various stakeholders, including parents and teachers, shared (SPS principal, personal communication, May 23, 2016). The administrators chose the Saxon Phonics and Spelling program (Houghton Mifflin Harcourt, 2017) to replace the Bob Jones phonics program that was previously used in kindergarten through grade 3. The Saxon Phonics and Spelling program (henceforth "Saxon") presents a research-based method focused on phonics, decoding, spelling, and fluency. The design of the program allows for pattern building within the structure of words and sounds to promote greater fluency and transfer of patterns into everyday spelling. The Saxon program differs from the previous program in terms of the different instructional strategies and teaching techniques involved in delivering the curriculum.

Previous researchers have asserted that teachers should implement curricula with fidelity to meet various objectives for student preparedness (McShane & Eden, 2015; Stellar, 2016). The results from the NCES study (2017) mentioned above indicated that 80% of teachers who implemented the curriculum with high to moderate fidelity reported significant improvements in teaching practices and strategies useful for supporting student learning. In addition, the literature offers data in support of the need for consistency in using a curriculum for maximum benefit to the students (McNeill, Katsh-Singer, Gonzalez-Howard, & Lopez, 2016).

Research on identifying the barriers to the full implementation of a curriculum is needed. Understanding the barriers involved would require determining teachers' experience when facing a new innovation or change (AIR, 2016). With the 2017 introduction in the United States of the Every Student Succeeds Act, or ESSA (United States Department of Education [USDOE], 2017), state and administrative expectations for accurate and faithful curricular implementation have become paramount for student success, regardless of individual academic needs. Because one of the goals of ESSA (USDOE, 2017) is student preparedness, achieving an understanding of what prevents teachers from faithful curricular implementation will require evaluation to improve student success (USDOE, 2017). Identifying teacher concerns connects to the current proposed study because of the need to understand barriers that may inhibit teachers when they must implement a new curriculum change. Addressing these concerns both before and during the curriculum-implementation process will increase the success rate by giving administrators the proper tools they need to support teachers through curriculum changes (AIR, 2016). This study also calls attention to possible reasons to explain why full curriculum implementation does not occur, in addition to addressing the barriers that teachers often report.

RESEARCH QUESTIONS

The study's research questions (RQs) focus on understanding the reasons that either support or prevent teachers' implementation of a new phonics curriculum. The study investigated the teachers' experiences and practices with their implementation of the new curriculum:

RQ1: What concerns, successes, and barriers have teachers reported during the implementation of the newly purchased phonics curriculum?

RQ 2: What resources do teachers believe are necessary to achieve a more successful implementation of the new phonics curriculum?

RQ 3: What types of staff support have administrators reported being included before and

during implementation of the new phonics curriculum?

RQ4: What components of the phonics curriculum do teachers include or omit in their instructional practices?

LITERATURE REVIEW

To support the purpose of this qualitative case study, an analysis of the literature from current, peer-reviewed studies and articles was conducted to provide further information on the topic. The related literature substantiates the problem and highlights perspectives for understanding the barriers to complete implementation of new curricula and how teachers view available systems for curriculum support.

The conceptual framework for the proposed study is the CBAM (AIR, 2016). The concept or phenomenon grounding the study within the CBAM includes a resistance to change and perceived barriers to organizational change or innovation. The choice of this framework developed from the value placed on preparing educators for change through organized methods of data gathering and an action plan for support during the process.

Hall and Hord (2015) developed the CBAM to address concerns about the implementation of major changes in an organization. The history of the CBAM began in 1965 when the US Elementary Secondary Education Act (ESEA) passed, which called for educational reform (Hall, 2015). In developing the CBAM, Hall and Hord (2015) emphasized that educators should be helped to weather changes by proactively addressing their concerns and fears before the onset of any innovation, challenge, or change (such as curriculum implementation), which is a similar approach to that used in the current study.

The constructs of this research-based framework include innovation configuration, stages of concern, and levels of use. *Innovation configurations* provide administrators with detailed directions necessary for teachers to achieve optimal implementation strategies. This stage resembles a map or path that features the steps necessary to reach the goal of high-quality implementation of the new curriculum. The various *stages of concern* consist of a process that allows administrators to discover teachers' attitudes, beliefs, and values about a new curriculum. In the current study, a questionnaire, several interviews, and various open-ended statements gave teachers the opportunity to share their concerns and any perceived barriers connected to the implementation of the new curriculum. Finally, *levels of use* are the actions and monitoring components necessary to determine implementation success as well as the remediation of barriers based on data from the stages of concern.

Al-Shabat (2014) and Derrington and Campbell (2015) used the CBAM for the assessment of teacher concerns for improving change integration. Using the Stages of Concern Questionnaire (SoCQ) and subsequent interviews, Al-Shabat (2014) determined which factors concerned teachers within the six stages. Staff within stage 0 (Awareness) expressed the desire to know more about e-learning, whereas many teachers in stage 2 (Information) felt uninformed and required more clarity on the procurement of resources to see such implementation success. Information revealed from both studies provided administrators the direction necessary to address concerns proactively.

For this study, the focus was narrowed to stages of concern (see Table 1; Appendix A) to determine what concerns existed in connection to new curricular implementation. The choice of this framework is appropriate because this study centers on the need to identify the reasons that teachers are prevented from successfully implementing the new phonics curriculum; this

identification occurred through the constructs of the CBAM (AIR, 2016). Logical connections among the key elements for this framework emphasize the need to understand and identify the barriers, practices, and concerns teachers experience when implementing a new curriculum, all of which serve as the purpose of this study.

CURRICULAR IMPLEMENTATION

Curriculum implementation refers to how teachers deliver instruction and assessment through the use of specified resources provided in a curriculum. Curriculum designs generally provide instructional suggestions, scripts, lesson plans, and assessment options related to a set of objectives. Such designs focus on consistency to help teachers successfully implement and maintain the curricular structure in order to meet various objectives (Wiles & Bondi, 2014). As noted earlier, Wiles and Bondi (2014) defined horizontal alignment as similar instructional practices and curriculum use between teachers in the same grade level, and vertical alignment as similarities in instructional practices and fidelity of curriculum implementation between the previous and following grade levels. Having curriculum alignment between the same grades and the preceding and following grades levels offers consistency in supporting learning objectives and expectations designed to promote student preparedness and growth (Tweedie & Kim, 2015).

Understanding the beliefs and concerns of teachers can provide insights into whether curriculum implementation will meet with success or failure. McNeill et al. (2016) and Rakes and Dunn (2015) have all substantiated this notion by addressing the impact of teachers' beliefs about given objectives in science curricula. McNeill et al. (2016) found that teachers' beliefs significantly influence their decisions for instruction. If beliefs play such a vital role, then taking time to learn about teachers' concerns, values, and perceptions should improve the implementation process by proactively addressing these areas (Al-Shabatat, 2014; Rakes & Dunn, 2015). One of McNeill et al.'s (2016) primary recommendations included preparing teachers through PD and collaborative opportunities; specifically, professional development should make sure that teachers fully understand the objectives and receive time to try the new curriculum with a class to support teacher learning. The need for teacher understanding and efficacy when implementing a new curriculum is apparent, especially considering the impact of these factors on student learning.

To ensure that curricular innovations are implemented with fidelity, instructional practices should be aligned to the specific learning goals provided in the curriculum (MacDonald, Barton, Baguley, & Hartwig, 2016; Phillips, Ingrole, Burris, & Tabulda, 2017). Curricular implementation encompasses different components, including the delivery of the curriculum through resources and instructional practices. To implement curricula with fidelity, instructional practices must align with the curriculum as well as support the individual needs of the students (Causarano, 2015). In addition, teacher preparedness for curriculum implementation plays a vital role (McNeill et al., 2016). Causarano (2015) specifically found this to be true through a study evaluating the quality of math instruction in an urban school and the impact on student-teacher relationships. The findings from their study supported the need for teachers to know the curriculum well to strengthen instructional practices. Content instruction depends on the quality of the explanations the teachers offer (MacDonald et al., 2016). MacDonald et al. (2016) reinforce the need for quality instruction and commitment through their recommendation that PD should help teachers deliver the prescribed curriculum.

Sometimes the problem with implementation results from a problem with the curriculum itself (Caropreso, Haggerty, & Ladenheim, 2016). Bell (2015) analyzed the advantages and disadvantages of an English grammar curriculum; specifically, the guidance and directives provided to support teachers. Though Bell found the curriculum to be accurate overall, he found that the materials lacked pedagogical guidance to help teachers understand the lessons accurately enough to teach them. Bell pointed out another necessary component when considering the adoption of a new curriculum, but he reinforced how proper training played into implementing the curriculum with confidence (Caropreso et al., 2016; McNeill et al., 2016). Bell found that a lack of training or guidance for curriculum hindered accurate delivery to students. Once again, this type of barrier has been found to influence student growth and learning (Causarano, 2015).

CURRICULAR ALIGNMENT

Having curricular and instructional alignment between grade levels is necessary to support student achievement and to meet learning objectives; in turn, alignment is supported when teachers choose to implement the curriculum with fidelity (Early et al., 2014; Wiles & Bondi, 2014). Research on schools in various states has shown that a lack of fidelity with the curriculum hinders alignment between classes in the same grade and grade levels and creates instructional inconsistencies among teachers (Early et al., 2014). Early et al. (2014) and Wiles and Bondi (2014) showed low student performance and gaps in the knowledge necessary for the following grade level.

Numerous researchers have identified the need to clarify which factors support or prevent alignment (Causarano, 2015; Early et al., 2014; Polikoff & Porter, 2014; Tweedie & Kim, 2015). Curriculum alignment has proven to be important for student success based on the values and needs expressed by students (Tweedie & Kim, 2015). Tweedie and Kim (2015) found various areas of misalignment, as perceived by students; their findings called attention to areas not covered in the curriculum that then created learning gaps. Certain aspects, such as social acculturation, proved to be overlooked by instructors and curriculum planners in the process of learning English, which was something students rated as vital to success in school (Tweedie & Kim, 2015). Such exclusions point to an area of misalignment that prevents students from fully connecting to and understanding the objectives of the curriculum.

Prior research has shown that breakdowns in alignment often occur because of barriers caused by teachers (Early et al., 2014). Early et al. (2016) identified one hindrance to alignment from teachers who struggle with conflict during collaborative opportunities. The authors discovered that even though collaborative opportunities existed, skills for negotiating challenges or conflicts proved difficult for the participants. These findings provide two important points: (a) the concerns of teachers require evaluation before beginning collaborative co-teaching groups, and (b) this unpreparedness hinders alignment because of conflicting roles in student support.

Causarano (2015) offered a different perspective on how teachers view curriculum alignment and preventative barriers; he argues that teachers' self-reflective practices improve curriculum alignment and instruction. Other researchers, however, have found that curricular and instructional quality and teacher preparedness influence alignment (Early et al., 2014; Tweedie & Kim, 2015). The need for self-reflection determines what aspects of a literacy curriculum (for example) align accordingly in order to prepare teachers with the tools necessary for preparing students. Causarano (2015) highlighted the need for alignment as well as increased understanding into the requirements for teachers to effectively implement curricula and align

instructional practices. The promotion of self-reflective practices, according to Causarano (2015), offered further insight into the barriers to the successful implementation of a new or revised curriculum. Causarano argued that because the effects of a lack of alignment will potentially harm students, teachers' abilities to reflect on their practices should be supported.

In contrast to the literature that Polikoff and Porter (2014) presented in their study on the connections between alignment and implementation, the authors (2014) found no evidence of an association between teacher effectiveness and instructional alignment. These findings later supported Causarano's study (2015). Polikoff and Porter (2014) explored the possible connections between instructional alignment, pedagogical quality, and student learning and state-mandated benchmarks but found no connection. This result created questions about how to effectively measure these categories and whether or not instructional alignment between standards and delivery of the curriculum are connected to pedagogical quality. Because no evidence supports a connection, the question also arises about how to effectively measure alignment as it is connected to the role of the teacher.

TEACHER ROLES

The roles of teachers remain instrumental in the success or failure of a curriculum (Loflin, 2016). In many cases, researchers have supported the need to thoroughly understand teachers' roles and concerns during the implementation of a new curriculum (Hall & Hord, 2015). Of the many roles defined in the literature, teacher fidelity stands out as being important but also for being inconsistent among teachers (Loflin, 2016).

Jess, Carse, and Keay (2016) found the need to prepare and train teachers to meet the objectives of a curriculum; specifically, the authors' focus was on the curriculum-development process and the role of the educator. Jess et al. (2016) argued that teachers need the capacity to design developmentally appropriate learning tasks that are aligned to curricular expectations. The focus of training and professional development requires an emphasis on teaching how best to interpret the curriculum so that students' needs will be aligned with appropriate instructional practices (Jess et al., 2016). One way to support this situation, as Jess et al. (2016) recommend, includes allowing teachers primary involvement in curriculum development and the process of alignment as it pertains to knowing student needs, and then instructing accordingly. The authors found that understanding how teachers perceive their roles in curriculum development and implementation provides insight into teachers' concerns about implementing a new curriculum (Jess et al., 2016).

CURRICULUM FIDELITY

When considering the roles that teachers take on in the execution of an innovation, it is necessary to fully understand teachers' concerns within specific areas of change (Lochner et al., 2015). One of the leading roles of the teacher includes delivering a curriculum with fidelity, which means implementing the curriculum faithfully and keeping in step with its purpose and design. Fidelity and the trust association for curricular implementation can highlight teacher attitudes toward a curriculum. McShane and Eden (2015) offer insight into this problem with their study examining alignment between teacher implementation and the intended design of the curriculum. Thus, the study focused on whether teachers implemented the written curriculum with fidelity; the analysis also emphasized the vital role teachers play in successful new-

curriculum implementation (Budak, 2015). Some curricula remove the opportunities for decision-making in teacher instruction, which ignores or minimizes teachers' skills, strengths, and experience (Budak, 2015). Considering the vital role teachers play, determining what exactly has caused a lack of fidelity could help in determining if the curriculum itself is the problem (Hondrich, Hertel, Adl-Aminik, & Klieme, 2016). Hondrich et al. (2016) maintain that teachers may be more effective if they are given the freedom to adapt and modify a curriculum when warranted, yet the instructional support a given curriculum offers often supports student engagement within the specific curricular tasks the curriculum outlines.

Teacher beliefs about educational practices influence the actions that occur in the classroom, which can offer possible reasons for a lack of fidelity (Budak, 2015). The role of fidelity in accurately determining if a curriculum has achieved its intended purpose calls attention to another reason that teachers' roles require consideration. When a curriculum is implemented with fidelity, researchers can achieve accurate insights into whether the curriculum has met its intended objectives, which can then provide a better measure of student performance (Budak, 2015).

Because teacher fidelity influences student learning and the successful implementation of a curriculum, assessing fidelity requires research. Piasta, Justice, McGinty, Mashburn, and Slocum (2015) have identified four dimensions for assessing fidelity: (a) adherence, (b) exposure, (c) quality of program delivery, and (d) participant responsiveness. Fidelity is multidimensional because a curriculum generally consists of many components necessary for full implementation; teachers often choose specific aspects of a curriculum to implement while disregarding others based on personal variables such as beliefs, concerns, or contradictions in philosophy (Budak, 2015; Hondrich et al., 2016; Piasta et al., 2015). Piasta et al. determined that most teachers who choose to implement with high fidelity experience gains in student literacy skills. This data supports the need to prepare and train teachers accordingly in order to understand the impact that fidelity has on students (Piasta et al., 2015).

When studies consider fidelity, questions often arise about the reasons that teachers choose not to implement a curriculum as prescribed. In Brighton, Moon, and Huang's study (2015), teachers reported that administrators primarily emphasized fidelity to the program, even though the program did not meet the needs of advanced readers. Teachers who strayed from the curriculum claimed to have done so to meet the academic needs of their students. In this instance, fidelity to the reading curriculum created a lack of challenge and rigor for the more advanced students; this situation then created a learning plateau for those students (Brighton et al., 2015).

TEACHER CONCERNS

Teacher concerns play a part in the implementation of new curricula, because their concerns sometimes direct the choices teachers make when choosing to add or omit items from the curriculum (Bell, 2015; Causarano, 2015). The CBAM fits into determining what types of concerns teachers have and how to address these concerns to reduce barriers. Lambert, Velez, and Elliot (2014) explored implementation experiences and gained an understanding of the barriers teachers perceive when implementing a new curriculum. The emerging themes for potential barriers showed that: (1) some teachers adapted better than others for student-centered curricula, (2) teachers liked to have content available but were unable to finish the curriculum within a school year, (3) teachers required resources and tools to be successful, (4) teachers

showed concern about collaboration and professional development opportunities, and (5) the implementation process helped teachers to refocus (Lambert et al., 2014). These themes appear consistent with other studies that have been presented in support of the CBAM for understanding the concerns of teachers.

Narrowing down specific concerns for teachers who are implementing a new innovation often serves to direct decisions about how best to support the teachers. Donovan, Green, and Mason (2014), for example, documented the different ways in which twenty-first-century skills exist in classrooms using the CBAM innovation configuration (IC). In their study, an IC map consisted of a summary outlining various methods in which the key aspects of an innovation had become operational (Donovan et al., 2014). One of the leading concerns among the teachers included a lack of opportunities for collaboration and sharing among peers in support of the change. The identification of this specific concern highlights a value that teachers often place on collaboration (Lambert et al., 2014). Determining these concerns in advance could potentially provide the administration with direction for addressing concerns before the onset of the implementation of a change. Being able to narrow down specific concerns offers a chance to fine-tune PD opportunities for reducing anxieties at the onset of the change (Lambert et al., 2015).

In some situations, the use of the CBAM has shown concerns across more than one stage (Kwok, 2014). Kwok (2014) researched educator's concerns about the initiation of a liberal studies curriculum for secondary students in Hong Kong. The data showed an intense level of concern visible across all stages of concern, as discussed above. The teachers showed signs of high levels of stress and anxiety in each stage. In general, when teachers experience a high rate of concern, researchers often recommend singling out PD that emphasizes peer collaboration (Al-Shabatat, 2014; Derrington & Campbell, 2015).

What emerges from much of the literature is the need to understand the challenges brought on by change and the need to mitigate frustration and anxiety through these processes (Gautam, Lowery, Mays, & Durant, 2016). Understanding these aspects as contributors to resistance to change could help to better support teachers and improve student experiences. As the current literature consistently points out, identifying teacher concerns early, before the expected implementation, will increase the chance for the curriculum to be implemented with efficacy and fidelity (Doyle, Zhang, & Mattatall, 2015).

The use of the CBAM in educational settings has proven beneficial for determining the concerns of teachers who must adopt learning management systems. In Lochner et al.'s study (2015), the stages of concern again highlighted areas where teachers felt the most anxiety from aspects that may have prevented the successful adoption and execution of the new innovation. Because the CBAM serves as a process for change, the stages in the SoCQ show pressing concerns that alert administrators to the greatest areas of need. Doyle et al. (2015) also used the SoCQ to understand the concerns experienced by English language pre-service teachers as well as the changes that occur throughout the stages. Fourteen pre-service teachers participated over a three-week period in which the focus was on technology integration through the use of Wiki. Through a questionnaire, Kayaduman and Delialioğlu (2016) found that many pre-service teachers experienced the same common self-doubt, even with the provision of support and of necessary tools. These findings support the need to better understand any concerns that people should troubleshoot during the proposed change. For that particular study, the recommendation based on the SoCQ results highlighted the need for the design and development of appropriate guidance for pre-service teachers (Kayaduman and Delialioğlu, 2016).

ADMINISTRATIVE AND PROFESSIONAL SUPPORT

Researchers have identified administrative and professional support as being necessary for teacher success and the implementation of new initiatives (Bakir, Devers, & Hug; 2016; Bautista, Ng, Múñez, & Bull, 2016). Areas of support fall into different categories, but administrative influence, related administrative roles, and professional development opportunities are prioritized within the literature, thus supporting the need to highlight these areas for the successful implementation of a new curriculum (Cetin, 2016).

Recent studies have shown that administrative support and professional development opportunities influence whether or not teachers feel supported and comfortable with new curricular implementations (Bakir et al., 2016). In accordance with the CBAM, the difficulty surrounding a new change or innovation potentially increases concerns and fears among staff members. An effective curricular implementation will also rely on the attitudes of the administration and teachers (Thorn & Brasche, 2015). One method that has been distinguished through the CBAM literature includes the need for administrative and professional support (Hall, 2015). Support is available through different forms of professional development and professional learning communities (PLCs), which are designed to address any concerns that might hinder the successful implementation of a change but these factors are highly dependent on the influence and roles of the administrators (Hall, 2015).

ADMINISTRATIVE INFLUENCE

Over the years, many studies have determined the contributors to success and failure for new initiatives—specifically new-curriculum implementation—and have found that the administration's attitudes and perspectives influence teacher perceptions (Derrington & Campbell, 2015). An administrator who presents a negative attitude toward the initiative may cloud the perspectives of the teachers and could hinder the onset of implementation. Derrington and Campbell (2015) described principals' perceptions and concerns for the implementation of policies for new teacher evaluation practices; their study, which focused on understanding which types of support the principals who implement this change desire the most, found that principals expressed a lack of time as their primary frustration. The principals' dominant concern was related to time constraints. The study's primary finding was that concerns that failed to be addressed early in the process could potentially derail the change and hinder any possible results (Derrington & Campbell, 2015; Hall, 2015).

A principal's influence during an innovation ties directly to trust building and the foundations for fostering mutual respect (Park & Ham, 2016). Mehdinezhad and Mansouri (2016) corroborated this notion by investigating teachers' self-efficacy and principals' leadership traits. A significant relationship was proven to exist between these two areas. A principal's positive influence and support of teachers' intellectual growth stood out as key areas in support of teacher efficacy. Self-efficacy is important for principals to positively influence and encourage teachers while the teachers are experiencing changes that require action (Budak, 2015). Similarly to research presented by Mehdinezhad and Mansouri (2016), Budak (2015) found trust building to be vital, in addition to principals' attitudes about setting visions and goals for establishing a positive culture that is conducive to change. Establishing a shared vision, empowering staff, and building healthy relationships all allow principals to better understand

teachers' strengths and weaknesses, which then establishes trust and creates a positive influence over the staff (Torres, 2016).

PROFESSIONAL DEVELOPMENT

Professional Development offerings are key for supporting teachers in new initiatives (Smit & du Toit, 2016). One benefit of PD includes teachers' increased comfort and skill levels for implementing new curricula. Relevant and effective PD has been found to promote confidence and a greater understanding of objectives (Lia, 2016). Having time and conducting research to develop meaningful PD that will consider the needs, concerns, and experiences of the teacher will be valuable and likely to influence positive growth for the teacher (Lia, 2016). Coldwell (2017) found a connection between teacher confidence and PD. Coldwell (2017) found that PD increased skills knowledge, which enabled teachers' confidence in specific content areas; this in turn led to increased job satisfaction and professional motivation. A vital point in PD effectiveness includes the influencing factors and concerns that could potentially direct the outcomes of the PD. PD quality, personal motivation, organizational support, and government mandates all fall under areas for teachers' concerns and barriers to implementing a curriculum with fidelity. These factors all influence how teachers respond to PD (Coldwell, 2017).

Several studies have found that teacher efficacy stands out as an area supported by effective and relevant PD (Margolis, Durbin, & Doring, 2017). The authors assessed teacher efficacy in integrating new curriculum standards into content areas in classroom teaching. The authors found efficacy to be a primary factor in a teacher's competency level when integrating different content areas into an agriculture curriculum. They recommended ongoing and relevant PD to meet the needs of midcareer teachers. Maintaining teacher confidence and reducing anxiety through deliberate choices in PD content both help to support teachers through curriculum changes (Margolis et al., 2017).

Kyndt, Gijbels, Grosemans, and Donche (2016) explored different types of PD and their related effects on teachers. Kyndt et al. (2016) offer further insight into teachers' attitudes and beliefs as well as the concerns they experience from curriculum implementation through informal learning for professional growth. Teacher collaboration, team planning, or even mentoring may all be classified as informal learning opportunities. Informal learning, though not organized (as formal PD is), allows teachers to work together to reduce the feelings of isolation they often experience (Kyndt et al., 2016). Perhaps most important, as Kyndt et al. (2016) note, is that experience and age do not appear to affect new learning as much as personal attitude does. Understanding the differences in attitudes could help to break down the barriers to full curricular implementation. What this situation shows is that PD does not always need to be formal; most teachers hope that PD will be relevant to their content areas and will allow them to collaborate and problem-solve.

As the literature has pointed out, understanding teacher concerns helps administrators when choosing the PD that will be most relevant to teachers (Bakir et al., 2016). Bautista et al. (2016) substantiated this notion through a study in which they investigated teacher beliefs, priorities, and PD needs when implementing a curriculum. Bautista et al. (2016) found that teachers commonly showed eagerness for opportunities to strengthen their expertise in curriculum areas, and they needed PD to do so. Teachers' beliefs also influence their views of the curriculum. For example, if teachers perceive themselves as being unprepared or unfamiliar with a curriculum, then these beliefs will influence how they respond to and teach the curriculum

(Bautista et al., 2016). Bautista et al. (2016) recommend that PD should require alignment with teachers' learning demands to achieve optimal effectiveness.

Professional development plays a part in reducing anxiety when implementing a new curriculum (Hall, 2015). Caropreso et al. (2016) also found this to be true when using the SoCQ from the CBAM to assess teachers' perceptions of a mathematics curriculum during PD. Cetin (2016) found similar conclusions as Bautista et al. (2016) regarding the benefits of PD. Cetin (2016) included an increased understanding of science teachers' level of use for technology integration and the effect of PD sessions designed to improve comfort and proficiency. The teachers initially showed little knowledge on the subject area and a lack of training and skills necessary for successful integration. Cetin (2016) reported that following the PD sessions for technology, 58.5% of the teachers developed increased confidence and positive outlooks about the integration process. Cetin's study (2016) provides a concrete example of how PD improves teacher proficiency as well as alleviates concerns through the practical application of the curriculum. Teachers become more likely to implement curricula with fidelity when they feel well prepared through PD and develop the knowledge and awareness required for effective implementation (Cetin, 2016).

Supporting the need for PD and for understanding the concerns connected to a new curriculum implementation, Bandura's (1977) social learning theory emphasizes the importance of monitoring and modeling behaviors, attitudes, and emotional responses for a desired result. Bandura's (1977) theory connects to the CBAM because of the value it places on understanding emotional responses identified through the stages of concern. The importance of PD and the effect on teachers both align with the theory by directing attention to proper training for increased success in accurate curricular implementation.

METHODOLOGY

This study used a qualitative instrumental case study research design. Qualitative research seeks to clarify and explain viewpoints and experiences on a given phenomenon (Creswell, 2014). Instrumental case studies render data that provides insight into a specific issue, potentially reworking existing generalizations (Creswell, 2014). This study has investigated the concerns and perceived reasons that prevent or support teachers' full implementation of a new curriculum to gain insight into how teachers are (or are not) using the new curricular and instructional resources in support of vertical alignment. This instrumental case study highlighted teachers' perceptions and practices through in-depth interviews and analyses (Creswell, 2014). Because this study focused on understanding the reasons and perceived barriers that teachers experience during the implementation of a new curriculum, a case study design fit the study's objectives best. The instrumental case study approach to this study's problem was appropriate because of the need to identify concerns and barriers within a bounded system to improve curricular fidelity.

PARTICIPANTS

The participants selected for this study include teachers and administrators directly affected by the defined problem of the study. A total of 14 teachers teach phonics at the site, and four administrators oversee school faculty and operations (see Table 2; Appendix A). The sample size for this study is 10 ($n=10$). The originally proposed sample for the interviews

($n=10$) includes eight teachers and two administrators. The deliberate selection of the sample size arose from the small school size and the desire to protect participant privacy and identity (Creswell, 2014). This sample includes two teachers each from Grades K, 1, 2, and 3. These teachers interact most frequently with the curriculum. According to Creswell (2014), this sample size allows for more in-depth data without an excessive sample that would diminish the authenticity of the responses.

The inclusion criteria for the participants and timeframes include the following standards necessary for participation in the study: (a) participants must be 21 years or older, (b) participants must teach phonics (the subject area being studied), (c) participants must teach in grades K–3, and (d) participants must be available for two 30-minute classroom observations (60 minutes total), and one 60-minute interview. Data from the interviews and field notes from observations were analyzed using a coding system to highlight and identify similar/dissimilar themes among the participant data for reported concerns and observed instructional practices related to the phonics curriculum.

SETTING

Southwest Private School (SPS, a pseudonym) is a private preparatory school in southeast Texas. SPS has an approximate enrollment of 300 pre-K–12 students. A total of 25 teachers teach at this site. Eight teachers participated in the study and were selected based on previously determined criteria. The school consists of the lower school campus (pre-K–6) and the upper school campus (7th–12th grades).

DATA COLLECTION TOOLS

According to Yin (2014), an effective case study requires more than one source of evidence for the substantiation of qualitative data. In line with Creswell's (2014) recommendations, the proposed case study included three modes of data collection: the Stages of Concern Questionnaire (SoCQ), 60-minute semi-structured interviews, and 60-minute classroom observations. The SoCQ calls attention to the concerns teachers report and experience when implementing a new curriculum. Recorded semi-structured interviews addressed specific questions related to the perceived barriers participants experience during curriculum implementation. Classroom observations provided insight into which aspects of the curriculum were (or were not) being implemented with fidelity.

Creswell (2014) discusses shorter case study interviews as a viable option when focused on a specific area and when following a protocol. Because the focus of the present study was limited to phonics instruction, Creswell's (2014) recommended 60-minute timeframe was found to be suitable. The timeframe chosen for observations was drawn from Creswell (2014), who recommends conducting multiple observations over time for the subject of study. In this case, the phonics lessons generally last 30 minutes. In observing this lesson twice within two different months for each of the eight participants, the researcher gained keen insights into the patterns and consistencies associated with phonics instruction.

THE STAGES OF CONCERN QUESTIONNAIRE (SoCQ)

The SoCQ is a questionnaire developed in 1973 (AIR, 2016) as a way to understand the concerns people report when they are expected to participate in an organizational change. For the purposes of the present study, SoCQ was used to identify teachers' concerns when they were expected to implement a new curriculum; the SoCQ was also used to triangulate interview data. The use of alpha coefficients tests the internal reliability and consistency of the SoCQ. According to Creswell (2014) and George, Hall, and Stiegelbauer (2013), the alpha supplies a coefficient used for the estimation of score consistency in the SoCQ. Table 3 (See Appendix A) displays the alpha coefficients for the SoCQ, as reported by George et al. (2013).

Justification and appropriateness.

The justification for using SoCQ aligns with the framework chosen for the study. The CBAM (AIR, 2016) focuses on the necessity of understanding the concerns of those who are expected to implement a new innovation. Specifically, the SoCQ serves as the initial step in identifying their concerns to help alleviate the transition process. Using the questionnaire supported the search for the reasons behind why teachers choose not to implement a curriculum with fidelity and provided insight into specific barriers. The appropriateness of the SoCQ, according to Hall (2015), is that it provides the first round of data to substantiate the interview data participants provide in order to highlight any patterns in their responses. The purpose of this research was to understand the concerns and barriers that prevent teachers from fully and faithfully implementing a curriculum, and the SoCQ has provided data in support of the purpose and RQs for the study.

Collecting and recording data.

Data collection for the SoCQ occurred following IRB approval and was distributed among eight of the 10 participants (the teachers). Data were recorded through the participants' responses to the questionnaire. After completion of the questionnaire, participants placed their questionnaires in an envelope to maintain anonymity. The researcher then collected all of the questionnaires.

Generating and gathering data.

After collection of the questionnaires, the researcher analyzed the data to determine any similarities or differences in the participants' responses. This was done with the help of the computer program SPSS, which is designed to highlight commonalities in data.

System for tracking data.

The system for tracking these data was accomplished through the use of a research log to record data collection methods and by comparing the initial analysis to the proposed RQs. The research log contains any printouts used from the computer program used to analyze the questionnaire data.

INTERVIEWS

Creswell (2014) recommends using six different sources of evidence when conducting a case study, and interviews should be among those six. Conducting interviews allowed for an in-depth view into the perceptions and experiences of the participants. The use of interview data specifically target case study topics and in this study allowed for an insightful look into attitudes, values, and perceived obstacles (Creswell, 2014). The design of the interview questions (see Appendices B and C) was derived directly from the RQs of the case study.

Sufficiency of data collection.

The use of interviews served as a sufficient data collection method for this case study because data from the participants addressed the study's primary objectives. The design of the interview questions took into account the RQs and the purpose of the study. Creswell (2014) found interviews to be a vital source of data for case studies and find that interviews are commonly used for sufficient and rich data collection.

Collecting and recording data.

Before data collection can occur, obtaining written permission from the school's headmaster was the first step. Next, after receiving IRB approval, the researcher scheduled interviews with the participants and discussed informed consent and participant rights. The study's purpose and the procedures involved in the interviews were then explained. The procedures involved audiotaped 60-minute, five-question, semi-structured interviews. Confidentiality and privacy were discussed at this time to reassure the participants that their privacy would be protected.

Generating and gathering data.

An interview protocol was developed to promote standardization of the interview process. According to Creswell (2014), the use of an interview protocol provides further credibility to research. The interview questions were developed from the proposed RQs and from the specific needs related to curriculum implementation, fidelity, and alignment (Wiles & Bondi, 2014). Participants received interview questions before their scheduled interview times to support their comfort level (Creswell, 2014). An iPhone recording app was used to record interviews. The interviews were transcribed using an app that allows the uploading of audio files.

CLASSROOM OBSERVATIONS

The third method for data collection included classroom observations. An observation protocol directed areas for observation, which aligned with the purpose and RQs connected to the proposed study. The areas targeted for observation encompass how teachers use the curriculum and the extent to which implementation occurs with fidelity. Eight of the 10 participants (specifically, teachers) took part in classroom observations.

Source of instrumentation.

The observation protocol researcher designed and was aligned with the RQs and the purpose of the study, which sought to identify the perceptions, practices, and barriers that prevent faithful implementation of the phonics curriculum. Observations lasted at least 30–35 minutes for two different sessions per teacher, for a total of 60 minutes total (Creswell, 2014); the protocol contained a checklist and space for field notes.

Sufficiency of data collection.

Creswell (2014) has found that observations are a sufficient method for answering RQs. Observations will call attention to the practices teachers use when implementing the phonics curriculum. Observations may also provide data about which parts teachers choose to implement and which areas they omit. This connection will then help to show which concerns or specific barriers prevent fidelity during the implementation process. Conducting two 30-minute observations of each of the eight participants over two months provided the data necessary to address the RQs (Creswell, 2014).

Collecting and recording data.

Written permission from the headmaster was requested before data collection and recording. After IRB permission was granted, a scheduled time for participant observations took place. Based on when the participants taught phonics, the participants were able to choose which timeframe would best accommodate their schedules. Data was recorded using an observation protocol and field notes.

Generating and gathering data.

The observation protocol highlighted specific areas within the curriculum to determine the level at which teachers implemented with fidelity. The protocol checklist included how and when the teachers implemented; which prescribed resources, if any, the participants used; and whether or not teachers followed the script and recommended instructional practices. Next to the checklist, field notes on details related to the checklist points provided additional information on specific occurrences. Creswell (2014) emphasizes the importance of using detailed field notes and the benefits of using observational checklists.

INTERVIEW DATA COLLECTION PROCESS

After sharing the problem and plan for the study during a staff meeting, participants approached the researcher regarding participation. After distribution and signing of informed consent forms, the participants individually received the survey, including directions for completion. Participants received the survey and a two-week timeline for completion. Participants returned their completed surveys within one week to the researcher, who then placed the documents in a locked briefcase. The survey was then transported to the researcher's home and transferred to a locked filing cabinet until the data could be analyzed.

The recording of SoCQ data began with a data tally sheet provided by the survey developers. The survey authors recommend hand-scoring of the SoCQ for small samples sizes,

as was the case with the present study (George et al., 2013). This document provided directions for acquiring the raw scores and percentiles of each of the participants in their responses to each stage of concern in the survey. A peer debriefer verified the mathematical computations for accuracy for each of the ten participants. Qualifications for the peer debriefer include having a mathematical background in statistics as well as having computation skills. The debriefer works at a separate institution and signed the appropriate confidentiality forms. The steps for hand-scoring included documenting the responses for each question into categories for the different stages of concern. After each column was added, the sum was correlated with a percentage used to determine the highest level of concern for each participant. The transferal of this information into graph form provided a visual look into the level of concern for each specific stage. The graph mapped out what would be considered the top priorities and concerns the participants associated with the innovation, which in this study included the onboarding of a new phonics curriculum.

DATA ANALYSIS RESULTS

As recommended by Creswell (2014) for conducting case studies, more than one type of data was collected to triangulate the data and to improve credibility. Credibility refers to the accuracy and trustworthiness of data collection and analysis. Trustworthiness establishes the results of a study as believable, based on the methods used to support credibility (Creswell, 2014). Credibility measures used in this study included member checks, peer debriefing, and the use of more than one tool for triangulation. Member checks in general can prove especially important because participants substantiate and legitimize responses, further supporting trustworthiness. Data collection tools used for this study included the SoCQ questionnaire, one 60-minute interview, and two 30-minute observations. Each tool addressed the need for prolonged exposure in the field and aligned with the RQs. In addition, as directed by the conceptual framework chosen for this study, the data collection tools aligned with the CBAM and the problem identified for the study.

Data analysis occurred following completion of the data collection process, which took a total of four weeks. The process for each data collection tool is explained below. Analysis of the SoCQ, interviews, and observations occurred separately during the first stage, then together for comparison and identification of any patterns of responses for each tool. Responses among participants in the same data collection tool category received similar analyses to identify any trends and patterns apparent in the data. The process by which data generation, gathering, and recording occurred is outlined below.

STUDY FINDINGS

The problem of this study included a lack of fidelity in implementing a new phonics program and a distinctive lack of understanding of why the problem occurred among the teachers. The SoCQ provided data connected to why the problem may have been occurring. The findings from this study have revealed the levels of concern for each stage, as described by the CBAM and the SoCQ. The stages include: (0) No concern, (1) Information, (2) Personal, (3) Management, (4) Consequence, (5) Collaboration, and (6) Refocusing. Stage 0 means the participant currently experiences no concerns about the new curriculum because no other commitments or issues take precedence. Participants at stage 1 require more information about

the curriculum to increase their understanding of their expectations. Stage 2 flags personal concerns for participants; stage 2 also shows that participants harbor concerns about the personal time and commitments that will arise from the onboarding of the new curriculum. Stage 3 is related to management, who in this case expressed concerns about the time requirement for implementing the new approach. Stage 4 participants worry about the effect on students, while those at stage 5 require collaboration opportunities for idea sharing. Stage 6, the Refocusing stage, highlights a need for participants to improve the process related to the new approach.

For this study, the top two stages with the highest percentages of concern for each participant were examined, as recommended by George et al. (2013). Table 4 (see Appendix B) displays the primary stage of concern, while Table 5 provides the second-highest concern. For the primary stage shown in Table 4, the ten participants fell within stages 0 through 2. One-fifth (20%) of participants felt no concern about this curriculum change (stage 0), while 50% were at stage 1, the Information stage, where participants require more information about different areas of the new curriculum. Another 30% of participants were found to be in stage 2, the Personal stage, which indicates any personal concerns people might have about the effects of the curriculum change.

As shown in Table 5 (see Appendix B), the second-highest stages of concern showed a slight variation in concerns. None of the participants reported stage 0 (No concern) as their second-highest concern, while 40% of the participants identified stage 1 (Information) as the second highest, and another 40% identified stage 2 (Personal) as the second highest. The other 20% identified stage 3 (Management) as a concern. The Management stage reflects concerns about time management and commitments related to the change in comparison to one's current duties.

These findings support the problem through the data, which shows that the participants required further information on the curriculum and felt a need for more of an explanation. The findings in response to the RQs found that data rendered from the SoCQ addressed RQ1: What concerns, successes, and barriers have teachers reported during the implementation of the newly purchased phonics curriculum? The barriers and concerns the participants reported fell within the same three stages of concern: participants were at stages 0, 1, or 2 for primary concerns and stages 1, 2, and 3 for secondary concerns.

THEMES AND PATTERNS

The pattern most evident in the data shows that participants were in the initial stages of concern. Fifty percent of participants were in stage 1, the Information stage, with concerns ranging from not receiving enough information to wondering about timelines, expectations, and the objectives connected to the new curriculum. These results closely aligned with those of the 30% of participants who worried about how the change would potentially affect them personally (Stage 2). Stages 2 and 3 are loosely connected in terms of participants' concerns in not fully understanding the expectations and requirements of the new curriculum. The 20% of participants who scored at stage 0 (No concern) indicated that their concerns currently focused on other areas that required more attention. Notably, for the second-highest scores, no participants fell within stage 0, which indicates that each participant felt some degree of concern (from the first four stages) connected to the curriculum.

In summary, the data revealed percentage scores for each participant within the SoCQ. Each of the ten participants scored between stages 0 and 2 for primary concerns and between

stages 1 and 3 for secondary concerns. The highest concern between both primary and secondary concerns was stage 1 (Information), at 50% and 40%, respectively. Considering this data, the primary concern for participants was in the Information stage (Stage 1); these data demonstrate that the primary concern about and barrier to implementing the new curriculum includes a lack of adequate information for moving forward with the curriculum. This data addresses RQ1: What concerns, successes, and barriers have teachers reported during the implementation of the newly purchased phonics curriculum? The participants require additional information to make decisions and form opinions about the new curriculum and the expectations for onboarding procedures.

HOW DATA WAS ANALYZED

The transcription of audio-recorded interviews took place simultaneously through a transcribing app on the researcher's phone while audio-taping with a small recorder. After completion of each interview and initial transcription, the file was uploaded and emailed to the researcher in a Word document. Then, using the audio-recorder, the researcher went back and checked the transcriptions for accuracy. The participants were given time to review their transcripts to confirm their accuracy. Initial analysis took place next through careful reading of the transcriptions and highlighting any findings applicable to the problem of the study and its RQs.

The next steps in data analysis required various actions to ensure quality and credibility while supporting accuracy through participant member checks. The first reading of the transcripts provided initial themes connected to the RQs. The second reading drew comparisons for similarities and differences in participant responses, and the third reading of the data was done to solidify the primary themes found throughout the data (Creswell, 2014). The coding phase took approximately 5–6 weeks for completion, which included making comparisons between the SoCQ and the observation themes. The same processes of coding and analysis took place for each data collection tool and for each individual participant.

Each of the 10 participants took part in a 50 to 60-minute interview. The study sample included two administrators and eight teachers. Table 4 displays a summary of the themes found in the study. The interview data from the teachers showed differences in their perspectives on the phonics curriculum for fidelity, personal preference, and the perceived barriers to faithful implementation.

Teacher responses.

Eight of the 10 participants were teachers. The teacher interview questions (see Appendix B) addressed RQs 1–4. The following questions and responses addressed participant interviews.

Teacher Question 1 (TQ1) asked: “Do you implement the Saxon phonics curriculum as directed? If not, what specific areas, if any, do you use? If so, what are your thoughts, concerns, or perspectives on the program?”

Only three of the eight participants responded positively to this question. Five participants used a different phonics curriculum entirely, with only one of those five using Saxon as a supplement. The breakdown occurred when the adoption of Saxon took place; these participants determined that they would use the previous phonics curriculum that was already in

place. One reason that four of the participants cited was that the previous curriculum better met the needs of the students. One participant stated:

“Saxon is strictly a phonics program and didn’t have a reading program to go along with it. As an educator, I feel like if you’re going to teach a phonics lesson, you need the reading lesson to correlate with the phonics skill.”

The three participants who used Saxon stated they all used components of the program, but not always as directed. One pattern that arose between these participants indicated a dislike of the phonics readers. They found that this resource lacked purpose and rigor. One participant stated, “The readers are not my favorite. I don’t know why—I think it’s just personal preference. [They’re] not my favorite, I think because they’re not leveled, you know? It’s just on-level, below, or above.” Apart from the phonics readers, one participant mentioned concerns with the coding requirements in the Saxon program: “The coding seems a little complicated just for the children to remember, so even if the child can spell, the coding messes them up sometimes, so they just get confused.”

TQ2 asked, “Were you included in the curriculum selection process for Saxon phonics? If so, what were your opinions about the adoption? If not, what reasons contributed to your exclusion?”

Only one of eight participants answered positively to this question. Four participants stated that they had been excluded because they were hired after the curriculum adoption took place. One participant had a preference for Saxon but said, “The team lead preferred Bob Jones. I would have liked to know more about [Saxon].” The one participant included in the process declined Saxon for the teacher’s grade level because of a general dislike of the program itself, including its lack of a parallel reading program.

TQ3 asked, “When asked to implement a new curriculum, what are your initial thoughts, concerns, and actions connected to this change?”

The participants’ responses to this question proved similar to the first two questions. The eight participants expressed a need to know their expectations before their actual expectation of use. The participants would have preferred to have had the opportunity to view the curriculum in advance and to know what the administration required and expected. As one participant expressed, “The first thing I wonder is, how much work is this going to be?” Another participant mentioned that “Of course there’s some apprehension, because there’s more time involved in learning something new.” Three participants expressed a desire to have time to pilot the curriculum first to see if it adequately met the needs of the students.

TQ4 asked, “When teaching Saxon phonics, what value do you place on teaching the curriculum with fidelity, as prescribed by the authors?”

The responses between participants aligned on this question: they all responded negatively (i.e., they did not value teaching with fidelity), but they did so for various reasons. Somewhat ironically, however, the eight participants indicated that they did follow the sequence of skills for the phonics program. Some of the areas the participants omitted ranged from the recommended script to the suggested instructional techniques. Three participants found little value in the use of the phonics readers, the review, and the history components of Saxons, with one participant stating, “What I usually omit is the introduction, where they talk about where the words originated in the different continents. I don’t feel like it’s too relevant.” Another participant responded to this question with, “I don’t. Some of it’s too easy, or they’ve already learned it.” Five participants admitted to adjusting and supplementing the curriculum to support

student learning. One participant from this group stated, “I don’t, because they need additional information so that when they’re assessed, they can be successful.”

TQ5 asked, “If offered professional development and training for this program, would you choose to participate? Why or why not?”

This question was rephrased to include whatever phonics program the teachers implemented. The responses for this question varied. Eight of the participants responded positively. Training or professional development (PD) for phonics that involved collaboration with their peers served as the primary reason for their willingness to participate. One response included, “I’m new, so there’s always more to learn, especially ways to help the kids to learn the differences in patterns better.” Another participant indicated that “I would, because it’s the first time I’ve ever done it, so I’m very open to any recommendations on how to better teach specific areas.” One interviewee implied a willingness to participate only so that the interviewee would have opportunities to collaborate with others: “I’m always open to learning new ways to do different things, but I’d prefer to do that collaboratively with my team.” Another participant offered a different perspective on PD: “It’s important for us to do [PD] to maintain our certifications.”

TQ6 asked, “What administrative actions, if any, do you think would support the onboarding of a new curriculum?”

The responses to this question produced a pattern in which people showed a need for administrative actions about relevant PD, involvement in the training, and the provision of the resources necessary for implementation. One participant said:

I want them to come in and see the program and see how it functions. I would like them to back up purchasing things that are needed for the program if things are left out and we find we need them later.

Another participant stated that, “I’d like them to ask my input and what we think about the curriculum and take it into consideration before they pick a new curriculum.” Another participant said, “A lot of times we’re given the program with no training, so I’d like them to offer training if it’s needed.” In support of the previous statement, a different participant said, “Just allow us time, and they should get the materials to us soon as possible, like early in the summer and not during the school year.” Echoing previous responses, one participant stated, “Definitely training and the necessary materials. Having someone come in and explain how to do it is definitely big.” Training proved important to the participants. One said, “Any training would be great, whether that’s bringing someone in like we did for Shurley Grammar [referring to a system of instructional materials]—that was really helpful for me.”

In summary, the data showed discrepancies between who actually implemented Saxon and who implemented different phonics programs. Only one of eight teachers was included in the selection process, although the hiring of four of the participants occurred after curriculum selection had taken place. The participants admitted to a lack of fidelity when implementing their specific programs but generally adhered to the sequence and primary skills of the curriculum. Training, collaboration, and necessary resources resulted in a primary pattern in response to necessary administrative actions. The participants expressed a need for relevant PD and the ancillary materials or resources required for a successful implementation.

Administrator responses.

Two of the ten participants of this study were administrators. The participants responded to the following interview questions, which sought to answer RQs 1–4. The questions and participant responses follow.

Administrator Question 1 (AQ1) asked, “Were you included in the curriculum selection process for Saxon phonics? If so, what were your opinions about the adoption? If not, what reasons contributed to your exclusion?” As first-year, first-time administrators, both participants responded negatively to this question. Participant A mentioned having little experience with the curriculum, but the administrator had heard positive remarks from teachers about the Saxon program. Participant B echoed this statement (although Participant B was unaware of Participant A’s response) by agreeing that the program had generated some positive feedback, although the participant had heard a few parent concerns in connection to the program’s rigor and grade-level expectations. The reasons for both participants’ exclusion from the selection included being hired after the curriculum had been formally adopted.

AQ2 asked, “As an administrator, what procedures do you use, if any, to help teachers through the introduction and implementation of a new curriculum?” Because Participants A and B were first-year administrators, both spoke to what they thought should be available versus what currently existed in place. Participant A suggested directing teachers toward online resources, which usually provide free printables or resources used to supplement the curriculum. Participant A had not experienced any teachers asking for support for the curriculum. Participant B suggested the need to ensure that the process for curriculum selection would involve teachers and would encompass a slow-paced process to allow adjustment time for the teachers. Participant B expressed the need for adequate time for the teachers to learn and practice the new curriculum. The provision of such time would ideally serve as a procedure for support; at the time, however, concrete procedures for support remained in the planning stages for future implementations of the new curriculum.

AQ3 asked, “When asked to implement a new curriculum, what resources are available to support teachers through this change?” Participants A and B answered this question by sharing proposed resources, because neither had yet experienced the official onboarding of a new curriculum. Participant A stated that teachers “should be provided with the necessary materials” connected to the curriculum—in other words, making sure that all components necessary for a complete implementation would be purchased. Participant A recommended having training by curriculum representatives. Participant A stated, “I think it’s really valuable for teachers to see how [the curriculum] works and in which ways it can be used.” This statement aligned with the response of Participant B, who stated, “It would depend on the curriculum, but often there are online classes you can take [with a representative], so that can help the teachers.” Participant B mentioned the possibility of having a “go-to” person for each grade level to offer support with the curriculum.

AQ4 asked, “As an administrator, how do you monitor the curricular fidelity of teachers for a new curriculum?” At the time, both participants stated that up until the current semester, no observations or methods for monitoring curricular fidelity had been done, although in the third marking period, the department heads conducted observations for this purpose. According to Participant B, the use of a checklist/protocol would help to direct observations.

AQ5 asked, “If offered professional development and training for the Saxon phonics program, would you choose to participate? Why or why not?” Participant A expressed interest and a desire to participate, stating that “I need a basic understanding of how it works so that when parents call me, I’ll know what their kids are doing, and it will make sense to me so that I

[can] have some kind of input if things come up.” Participant B also expressed interest but said, “Yeah, I think it is good to know, but I don’t think you could as an administrator—all of [the PD], all the time—because of limited time.” Both participants preferred to know more about the curriculum to support teachers and to gain a different perspective on the curriculum.

AQ6 asked, “What administrative actions, if any, do you think would support the onboarding of a new curriculum?” Participant A responded, “I think one of the things is making resources available to [the teachers], whether it be to a conference or workshop. I think personally I find those to be probably the most helpful, and also directing someone, possibly someone on staff, you know, who’s used the material maybe before, or even connecting with somebody in the district locally that maybe [has used] it that can be a resource. I think making a variety of things available [would be helpful]. I don’t like it if you’re starting some work with a number of teachers but only send one person as a representative [to a training]. It’s important that if everybody’s going to be using it, then you let everybody go and hear the same thing so that you can have time to talk about it and see how it’s going to work.”

Participant B stressed that onboarding must begin slowly, with carefully thought-out stages, and be systematic, saying that “I think it needs to be done slowly [and] carefully, so not fast. I think because change in and of itself stresses people, but when it’s very fast, even a good change can be difficult.” Participant B also expressed the need for collaboration opportunities before, during, and after implementation take place. The key, according to Participant B, “is being careful not to increase the load of the teachers.”

In summary, Participants A and B had aligned perspectives in the areas of collaboration and in providing teachers with adequate resources connected to the curriculum. Evidence of this pattern was visible in their responses in which they outlined the need for additional time and training to best support the teachers through a new change. One notable difference between them included their views on participating in professional development. Whereas both recognized the importance of PD, Participant B expressed concerns connected to time and availability for participating. Participants A and B, both in their first year serving as administrators, appeared to agree in terms of their priorities, based on their interview responses for learning and supporting curriculum changes.

OBSERVATIONS DATA COLLECTION PROCESS

During an observation protocol, each of the eight teacher-participants consented to two 30-minute observations. The first round of observations occurred before the holiday break in mid-December 2017; the second round took place in mid-January 2018. The protocol that the researcher and inter-rater used displayed teacher action, components of the curriculum, and student engagement. Each column had a place for recording field notes, which detailed what the rater observed in relation to the phonics curriculum/lesson taught for that session. The inter-rater and researcher then compared notes for the observations and discussed possible discrepancies, similarities, and differences seen during the observation. The observation protocols for each participant then remained in a secured file cabinet at the researcher’s residence until further analysis took place.

FINDINGS

The observation data addressed RQ4: What components of the phonics curriculum do teachers include or omit in their instructional practices? For this section, participants received alphabetic labels for organization purposes. The participants agreed to two observations, at least one month apart. Each analysis included a combination of the two observations and inter-rater agreement. During Participant A's observations, the presence of the primary skills, review, and sequence were noted during both lessons. Participant A used a curriculum other than Saxon but adhered closely to the format of the lesson during both observations. The curriculum resource materials used during the lesson included the phonics teacher edition, charts with songs/chants, CD player/CD, phonics cards, dry erase board, and word/letter cards.

Participant B also used a program other than Saxon but adhered to few aspects of the chosen program. Whereas most phonics lessons ranged from 25–30 minutes, the observed lesson lasted approximately 15 minutes. A brief review, the repetition of sound patterns, and the singing of songs/chants made up the majority of both lessons. Participant B omitted the use of phonics cards, worksheets, and support materials but supplemented the lesson with a game for matching the skill-words students learned.

Participant C followed the sequence of the phonics curriculum, though this participant also used a program other than Saxon. This participant implemented this other curriculum with high fidelity, following the order and recommended strategies. Participant C used the phonics teacher edition, phonics cards, charts with chants/songs, dry erase boards, a phonics worksheet, and individual phonics readers for both observations.

Participant D followed the program very closely but supplemented it in areas where the students required clarification. Fidelity in sequence, resource materials, and questioning script proved consistent. Supplementation occurred during both observations by the participant providing additional strategies for identifying letter patterns. Resource materials included the teacher edition, phonics word cards, and phonics worksheets. No omissions occurred—only supplementation.

Participant E taught each component of the lesson but chose to integrate different parts of the lesson into grammar and reading to support student understanding. Supplementation with different materials from outside the prescribed curriculum occurred during both observations. Participant E used the phonics worksheets but did not use phonics cards or charts for chants. Instead, the participant handwrote the components on the Smart Board. The students clearly recited the chants and participated readily in reading or spelling the phonics patterns presented in the lesson.

Participant F spent additional time reviewing previously taught concepts, separate from the prescribed lesson setup. Fidelity for both lessons (outside of extended review) was noted, following the sequence of new increments, guided practice, and independent practice. Students responded to questions, but active participation for coding (as directed by the lesson) did not occur. Students worked from their desks and followed the lesson, copying off the board. Resources included the Saxon teacher edition and phonics worksheets.

Participant G implemented Saxon with fidelity. Each component was represented, was implemented in sequence, and addressed the review, new increments, guided practice, and independent practice. The students actively participated in coding of the new increment and review words. Resources included the Saxon teacher edition, worksheets, and phonics

word/letter cards for both observations. The students appeared familiar with the routine and structure of the lesson, which allowed for smooth transitions and few disruptions.

Participant H focused on the new skill for the lesson but taught the lesson differently than prescribed. Supplemental materials included a thesaurus and handwritten words/sentences on the Smart Board. Participant H thoroughly reviewed the previous patterns for both lessons and spent the majority of the lessons having students code the phonics patterns. The goal for both observations appeared to include student understanding and mastery of the spelling patterns, but omission of all but one component of the Saxon lesson occurred.

In summary, with the exception of Participant G, Participants A–H either omitted or supplemented parts of the curriculum based on personal preference and the perceived needs of the students. The first and second observations aligned between the researcher and the inter-rater, thus substantiating the data's accuracy. The participants' common omissions included information on words' historical derivations, the use of leveled readers, and review patterns, all of which supported the interview data.

THEMES AND PATTERNS

Creswell (2014) recommends analyzing patterns between data sources. Data used for deriving themes included participant scores from the SoCQ, responses from interviews, and field notes attained from observations of the phonics curriculum. Prominent reoccurring themes for the SoCQ showed the same two stages of concern among the ten participants: Information (stage 1) and Personal (stage 2). The significance of this pattern shows that the participants identified a need for further information about the curriculum in order to successfully implement it. In addition, the participants expressed concern about the expectations on their personal time. The Personal stage identifies expectations on a person's time and resources. The participants' expression of concern in this area aligns with those who sought additional information, because both stages, according to George et al. (2013), are closely connected. During the analysis of participant responses, a pattern was noted in which participants worried about their unpreparedness because of a lack of information and expectations of the personal time that would be required.

Patterns between the SoCQ, interviews, and observations showed similarities in responses among participants. Patterns between the interviews and the SoCQ data showed common responses from all ten participants about needing/desiring additional information about a curriculum before implementation. Similarly, eight of the ten participants expressed a desire for additional PD and training when implementing a new curriculum. The top two concerns for the SoCQ—the Information and Personal stages—aligned with the interview responses for TQs 5 and 6 and AQs 5 and 6, which addressed training and administrative actions.

Patterns evident between interviews and observation appeared in connection to TQ4 and AQ4, where fidelity of the curriculum comes into question. TQ4 and AQ4 addressed RQ4: What components of the phonics curriculum do teachers include or omit in their instructional practices? The observation data aligned closely with the interview responses for what teachers included and omitted when teaching the phonics lesson. The teachers stated that they omitted components to support student learning, as did those who supplemented the lessons. The results firmly point to the need for the administration to provide quality and relevant PD for teachers as well as to offer opportunities for decision-making when teachers are asked to implement a new curriculum. The data also revealed that the participants felt concerns about not knowing their

expectations or because they lacked information or details in order to successfully implement the new curriculum.

LIMITATIONS

The potential limitations or weaknesses identified for this study include a small sample size, which reduces generalizability, and limited time spent in the field (Creswell, 2014). Within the study's data collection techniques, possible limitations include participants' potentially inaccurate responses to the questionnaire and interviews as well as potential reflexivity in seeking to provide responses that would be acceptable to the interviewer (Creswell, 2014). Finally, geographical location was a limitation, since one specific area was examined for the study.

Limitations associated with qualitative research in general include areas such as researcher experience and training. Qualitative research quality relies on the expertise, skills, and experience of the researcher. Creswell (2014) states that qualitative research may be more easily influenced by researcher bias than quantitative research. Participant responses can control the data in terms of honesty, recollection, or the desire to produce a response that will be pleasing to the researcher. Qualitative research may become time consuming and expensive for the researcher, which may also become a limitation (Creswell, 2014).

RECOMMENDATIONS

Some of the different ways to address the problem of the study could include conducting further research to determine how best to solve the site's problem of not knowing the teachers' concerns and fidelity issues related to the phonics program. A program evaluation could be another effective way to determine the effectiveness of the curriculum as well as teacher preparedness (Hall & Hord, 2015). Whereas professional development (PD) supports teachers' growth and learning, a program evaluation might determine if the program itself has effectively addressed objectives. Program evaluations require the collection of data on the program to identify the strengths, weaknesses, and overall effectiveness of a program.

A different approach to addressing the problem would include the full implementation of the concerns-based adoption model, or CBAM, which has served as the framework for this project. The CBAM directly addresses concerns and provides outlines to address various stages of concern to support teachers through changes and major innovations (Hall & Hord, 2015; George et al., 2013). The CBAM provides evaluation tools as well as systems to monitor growth and to support ownership of the change. Because the present study only utilized the SoCQ, using the remainder of the components in the framework would allow for delving more deeply into concerns and would provide a plan for the successful onboarding of a new initiative (Al-Shabat; 2014; AIR, 2016; George et al., 2013; Hall & Hord, 2015).

An alternative definition of the problem that is possibly missing from the present study would include teacher buy-in of the chosen curriculum, which could influence curriculum fidelity (Budak, 2015). Teacher concerns were identified, but assessing whether or not the teachers had opted for or explored the curriculum prior to its adoption remains unclear. Perhaps part of the problem included choosing a curriculum without conducting proper research before the actual adoption. With this in mind, a possible solution would be to allow time to pilot a curriculum before actual implementation occurs. This strategy would support teacher buy-in and

would allow teachers to collaborate with their peers on what they experience while piloting the program. Using a proactive approach could influence curriculum fidelity while offering opportunities for collaboration and the remediation of concerns (Loflin, 2016).

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Appendix A

Table 1
Stages of Concern

| Stages | Concerns |
|---------|--|
| Stage 0 | Awareness (unconcerned about the change) |
| Stage 1 | Information (requires additional information) |
| Stage 2 | Personal (personal effects of change on roles) |
| Stage 3 | Management (focus on tasks for change) |
| Stage 4 | Consequence (concerns about impact of change) |
| Stage 5 | Collaboration (concerns for opportunities for group problem-solving) |
| Stage 6 | Refocusing (seeking better ways to use the innovation) |

Note: table adapted from information from two studies on the stages of concern (Al-Shabatat, 2014; Derrington & Campbell, 2015).

Table 2
Alpha Coefficients of Internal Reliability for the SoCQ

| Stage | 0 | 1 | 2 | 3 | 4 | 5 | 6 |
|-------|-----|-----|-----|-----|-----|-----|-----|
| Alpha | .64 | .78 | .83 | .75 | .76 | .82 | .71 |

Note: this table is from *Measuring Implementation in Schools: The Stages of Concern Questionnaire* (George et al., 2013, pp. 20-21). The chart is based on 35 items, $n = 830$, from the original reliability test, fall 1974.

Table 1
Frequency of Highest Concern Stage

| Stage | 0 | 1 | 2 | 3 | 4 | 5 | 6 | Total |
|-------------------|-----|-----|-----|----|----|----|----|-------|
| # of Participants | 2 | 5 | 3 | 0 | 0 | 0 | 0 | 10 |
| % of Participants | 20% | 50% | 30% | 0% | 0% | 0% | 0% | 100% |

Appendix B

Table 4
Frequency of Second-Highest Concern Stage

| Stage | 0 | 1 | 2 | 3 | 4 | 5 | 6 | Total |
|-------------------|----|-----|-----|-----|----|----|----|-------|
| # of Participants | 0 | 4 | 4 | 2 | 0 | 0 | 0 | 10 |
| % of Participants | 0% | 40% | 40% | 20% | 0% | 0% | 0% | 100% |

Table 5
Summary of Themes

| <i>Theme</i> | <i>Description</i> |
|--------------|---|
| 1 | Concerns about requiring more information about the change |
| 2 | Concerns about the curriculum change's demands on personal time |
| 3 | Requires PD/training on the curriculum |
| 4 | Requires time for collaboration with teams/peers |

