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Instructional Stages: Part Two

—Expanded View of the Instructional Process—

KU-IRLD Staff and Edwin S. Ellis

This article, the second of three presents the KU-IRLD staff's expanded view of the stages of the instructional process. Part One [Strategram, Vol. 3 (2)] included a discussion of the critical factors which affect strategy performance, important instructional principles of strategy instruction, and Stage 1 (Pretest and Make Commitments) of the instructional process. These articles are abstracted from an article entitled "An Instructional Model for Teaching Learning Strategies" by E. S. Ellis, D. D. Deshler, B. K. Lenz, J. B. Schumaker, and F. L. Clark to appear in Focus on Exceptional Children in February, 1991. The key behaviors associated with each instructional stage follow on pages 3 through 5.

Stage 2: Describe the Strategy

In the Describe Stage, the teacher clearly "paints a picture" of the new strategy. The teacher describes the new strategy so that students can: (a) become aware of the overt and covert processes involved in performing the new strategy; (b) become aware of how the steps of the strategy are used to approach academic tasks and solve problems and how self-instruction is used to regulate use of the steps; (c) clearly see how this new strategy is different from their current habit of problem solving; and (d) become motivated to learn and apply the new strategy. There are two phases of instruction within this stage.

**Phase 1: Orientation and overview.** The purpose of this phase is to orient students to different reasons for adopting the new strategy and make them aware of where and when to use, or not use, the strategy. In this phase, the teacher should:

1. Ensure that students understand the rationales for learning the strategy and how the strategy can affect success across a wide number of settings.
2. Describe the general characteristics of situations in which the strategy can be used. Discuss examples of these situations and emphasize the relevance of the strategy in school, home, work, and leisure settings.
3. Prompt the students to compare their old learning habits with the strategy.

Phase 2: Present the strategy and the remembering system. During this instructional phase, the teacher presents the overall intent of the strategy as well as the nature and purpose of each of the strategy steps. As a part of this phase, the teacher should:

1. Describe the strategic processes involved in using the overall strategy.
2. Describe, explain, and guide students to understand the overt and covert processes involved in each step and the importance of self-instruction when performing a strategy.
3. Explain how to remember the strategy by discussing the remembering system used with the strategy.
4. Ensure that students understand the relationship between the remembering system and what is

> *Key behaviors associated with each stage are shown on the charts on pages 3 through 5.*
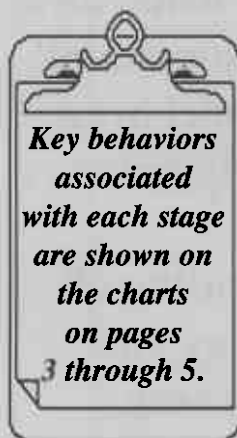
involved in applying the strategy with emphasis on self instruction.

5. Encourage students to compare and contrast the new strategic approach to their old approaches.
6. Guide students to set individual goals for learning the strategy.

Stage 3: Model the Strategy

In this stage, teachers teach students the cognitive behaviors and the overt physical acts they need to perform as they complete a given task. The Model Stage of instruction

> **"By involving students, the teacher can check their understanding of the strategy steps and the process involved in performing them."**

is fundamental for teaching and demonstrating these cognitive behaviors. Frequently, the Describe Stage of instruction is confused with the Model Stage. Modeling of cognitive behaviors by "thinking aloud" in the Model Stage can greatly enhance students' understanding of the strategy and speed learning. There are three phases of the Model Stage.

Phase 1: Orientation. In this phase, the teacher *reviews previous learning* by: (a) covering the nature and purpose of the strategy steps and where and when the strategy can be applied; (b) *personalizing the strategy* so that students understand how its use will benefit them; (c) *defining the lesson content* by explaining what a "model" is and how it can help students as learners and by describing briefly the activities in the lesson; and (d) *stating expectations* regarding student involvement in the lesson.

Phase 2: Presentation. In this phase, the teacher models or demonstrates the strategy. The demonstration, which should be fluid and organized, includes all the elements of how to think and act while performing the strategy. The demonstration emphasizes the cognitive acts required to perform the strategy through a thinking-aloud process. During this phase, the teacher should:

1. Emphasize three types of cognitive processes while thinking aloud. First, the teacher must demonstrate self-instruction. Second, the teacher models how to problem solve. Third, the teacher demonstrates the monitoring required while performing a strategy.
2. Demonstrate how to perform the task. The entire strategy must be demonstrated, and performance with regard to the whole task must be shown.
3. Avoid making mental leaps between specific steps or actions. Students will have difficulty making correct decisions throughout a strategy if they do not see the major thinking processes involved in a strategy.

Phase 3: Student enlistment. In this phase, students are prompted to gradually perform more and more of the required thought processes and physical acts themselves. Initially, students can be prompted to name the next step. Then, they should be prompted to state what they would say as they: (a) check their progress, (b) evaluate their performance, (c) make adjustments, and (d) problem solve. By involving students, the teacher can check their understanding of the strategy steps and the processes involved in performing them. As a part of this phase, the teacher should:

1. Require students to use the actual words they would say to themselves in using the strategy.
2. Provide feedback including correction and expansion of responses during the exercise.
3. Prompt as much self-talk as possible.
4. Engineer as much success as possible by assigning tasks that students are likely to complete successfully and by prompting involvement that is easy at first and then gradually becomes more complex.
5. Draw students' attention to good performance models and emphasize the importance of imitating the processes they have seen and heard.

For more detailed information about the Model Stage, refer to Jean Schumaker's article, "The Heart of Strategy Instruction: Effective Modeling" in Strategram, Vol. 1 (4).

> **"Modeling of cognitive behaviors by 'thinking aloud' in the Model Stage can greatly enhance students' understanding of the strategy and speed learning."**

Stage 2: Describe the Strategy

	KEY BEHAVIORS	SAMPLE STATEMENTS/MATERIALS/ACTIVITIES
Phase 1: Orientation and Overview	**Give/elicit rationales and benefits for learning the strategy.**	"How will this strategy help you?" "If you learn and use this Paragraph Writing Strategy, then you will write better paragraphs, and your grades on writing assignments will improve."
	Describe characteristics of situations where strategy can be used. Discuss example situations.	"Can you think of some situations in school (or outside of school) where you take tests?" "You can use the FIRST-Letter Mnemonic Strategy whenever you have to remember information in a list."
	Prompt comparisons of the strategy with old learning habits.	"How does the Test-Taking Strategy compare to the way you used to tackle tests?" "How is the Word Identification Strategy alike (or different than) what you used to do when you read assignments?"
Phase 2: Present the strategy and the remembering system	**Describe the strategic processes in the overall strategy.**	"The FIRST-Letter Mnemonic Strategy works because it helps you organize the information so that it is easier to remember." "The Paraphrasing Strategy works because it helps you identify the important information, the main idea and the important details."
	Describe, explain, and guide understanding of overt and covert processes and importance of self-instruction.	Explain how an individual must think as he implements each step, e.g., "As you do this step, you must remember to ask yourself these questions, ..." Explain the physical actions which accompany specific steps. Discuss all the decisions which must be made in each step. Explain how to use self-instruction, e.g., "You need to know the steps well so you can talk yourself through all the steps as you use the strategy."
	Explain remembering system.	"Notice that the words 'Read,' 'Ask,' and 'Put' start with the letters 'R,' 'A,' and 'P.' What does that spell?" "If we use the first letter in the first word of each strategy step to form a word or a mnemonic, we can use the mnemonic to remind us of that step and what we are to do."
	Explain relationship between remembering system and strategy emphasizing self instruction.	"What do we do when we 'rap'?" "How is the word 'RAP' related to what we do in the Paraphrasing Strategy?" "Anytime you need to remember the strategy steps, what word will you use to remind yourself of the steps?"
	Encourage students to compare and contrast strategy with old approaches.	"How does the Error Monitoring Strategy compare to the way you used to proofread your writing?" "What are the advantages of using this strategy?" "Why is this strategy more effective than your old way of studying?"
	Guide students to set goals for learning the strategy.	"It's time to set goals for how quickly you will learn to write Topic Sentences." "You will write your goals for learning this strategy in the Goal Setting Section on the Progress Chart."

Stage 3: Model the Strategy

	KEY BEHAVIORS	SAMPLE STATEMENTS/MATERIALS/ACTIVITIES
Phase 1: Orientation	**Review previous learning.**	"Let's go over the steps of the strategy that we discussed yesterday." "Where could you use this strategy at school, at home, on the job?" "What might cue you to use this strategy?"
	Personalize the strategy.	"Tell me why you think this strategy is going to help you." "If you don't learn this strategy, what might be some of the consequences that you might face in . . . ?"
	Define the content.	"Today, I will give you a demonstration of the steps involved in using the _____ strategy." "What is a model?"
	State expectations.	"What do you think I am (you are) going to do?" "Remember, today you are going to be involved in showing everyone how you think about this strategy, too."
Phase 2: Presentation	**Think aloud.**	"Okay, let me see, if I do this . . . then . . . . Hey, it worked!" "What would happen if I . . . , hmm, no, I can't do that." "Let me try . . . . Okay, I can do it again."
	Self-instruct.	"Okay, now I will use the _____ strategy." "The first step is _____. In this step, I . . . ." "Okay, now I need to do the next step which is _____."
	Problem solve.	"Hmm . . . this doesn't work, what should I do?" "Okay, let me try this . . . . How about this . . . ? This seems to work. I think I will do it this way."
	Self-monitor.	"How did I do on that? Did I do that right? Let me check that." "I better do this over . . . hmm. Why did I do that? Does that look right?" "I did that right, great job! It worked! Great, right on the mark!"
Phase 3: Student Enlistment	**Perform task.**	"Now, I need to _____." (do it) "I organize this by _____." (do it) "I complete this by _____." (do it)
	Prompt involvement.	"Okay, I've gotten you started, what's next?" "What would you say to yourself on this step?" "What question should you ask yourself here?"
	Check understanding.	"Explain what you are supposed to do here." "Show us what you do here. Explain it as you do it." "What is involved in that step?"
	Correct and expand responses.	"During this step, you need to say to yourself that . . . . Now you do it." "Right, but don't forget to . . . . Now, show me how you would do it." "Okay, stop. In this part, we need to . . . . What did you do?"
	Engineer success.	"You're doing fine. Now, do this . . . . Okay, back up, and try this . . . . Good. Wait a minute, what's the cue card say? Great, you did it." "Let's do it again, a little slower. It will be easier if you use your cue cards."

Stage 4: Verbal Practice

	KEY BEHAVIORS	SAMPLE STATEMENTS/MATERIALS/ACTIVITIES
Phase 1: Verbal Elaboration	**Ask student (s) to explain overall strategic process**	"In your own words, tell me what you do in the Paraphrasing Strategy." "When you use the Error Monitoring Strategy, what are you doing?"
	Ask student(s) to elaborate on specific strategy steps	"In your own words, tell me what you do as you 'Interrogate yourself using the COPS questions'." "What do you do when you 'Transfer the information to a card'?"
	Ask student(s) why each step is important to the overall strategic process	"Why is the 'Survey' step an important part of the Test-Taking Strategy?" "How does knowing three different types of Topic Sentences help you as a writer?"
	Ask student(s) how self-instruction will help her perform the strategy	"Why is it important to talk to yourself as you follow the 'PENS' steps?" "How do you know what to do after you 'Separate the suffix'?"
Phase 2: Verbal Rehearsal	**Ask student(s) in order (then randomly) to name steps with cues, then without cues**	"Jenny, name the first step of the Education Planning Strategy." (with cues visible) "Good. Sarah named the 'L' step of LISTS; Mark, name the 'T' step." (without cues visible)
	Facilitate student practice of steps	"You must be able to name all the steps of the Word Identification Strategy and the Rules of 2's and 3's without any errors. You may practice alone or with a partner. When you feel confident that you can name the steps and the rules, come to me for the oral quiz."
	Check individual mastery	"What are the steps of the Paraphrasing Strategy?" "What do you do when you 'Prepare to succeed' in the Test-Taking Strategy?"

Stage 4: Verbal Practice

The focus of this instructional stage is on ensuring comprehension of the process involved in applying the new strategy. The instructional emphasis during this stage is on facilitating student mediation or elaboration of the key information in their own words.

Phase 1: Verbal elaboration. The purpose of this phase is to facilitate explanation of key information associated with the strategy in the students' own words. Initially, students elaborate on what the overall strategic process is designed to accomplish and generally what the process involves. Once students are able to describe the "big picture" in their own words, then the focus shifts to faciliating student elaboration of the specific strategy steps. Here, while looking at the list of the strategy steps, students describe what each step is designed to do and *why* it is an important component to the overall strategic process. Students should also be asked to elaborate on the role of self-instruction with regard to performing the strategy.

Phase 2: Verbal rehearsal. Before students are asked to use a strategy, they must learn to name the strategy steps at an automatic level. Thus, students are expected to commit the strategy steps to memory via rote rehearsal. Steps are memorized to fluent 100% mastery levels so that they can serve as self-instructional cues as the strategy is performed. Students' verbal mastery of the steps is checked individually until they reach the mastery criterion.

Learning Logs For Strategy Implementation

Gloria Prentice is a high school resource room teacher (9-12) in Pomona, California. Gloria received her undergraduate degree from Southern Arkansas University in Magnolia, Arkansas. She earned her California teaching credential, Master's degree and Administrative Service Credential from Fullerton State University in Fullerton, California.

After using the *Sentence Writing, Error Monitoring* and *Test -Taking strategies*, Gloria found that her students needed an

Gloria Prentice

instrument to ensure in-depth mastery. She devised a learning log for immediate feedback; it works in the following manner.

At the end of each day's lesson, the teacher passes out the learning log.

Students must answer all questions using complete sentences. The students are allowed from five to seven minutes to complete the task. Logs are collected and graded by the teacher before the next class meeting. Before the lesson starts the following day, the teacher spends approximately five to seven minutes discussing items from the previous day's log.

Gloria has implemented the learning log in two regular classes this past fall. She worked collaboratively with a U.S. History teacher and an American Literature/English teacher. Her plan is to include a Life Science class in the spring. An example of the log can be seen on page 7.

Share Your Classroom Techniques!

Strategram is requesting that teachers and trainers submit any techniques that are used to teach the helping verbs. KU-IRLD staff hear good ideas in different training sessions throughout the country, but it is difficult to recall all of the details needed for sharing these ideas in our newsletters.

Please send any worksheets, games, or activities to:

Mary Lee
KU-IRLD
Rm. 3061
Dole Human Dev. Center
University of Kansas
Lawrence, KS 66045

When sending these tips please include the name, address and phone number of the originator. A complete description of how the tip can be used in the classroom should be included. **Thank you for sharing!!!**

Strategram is Informative!

Name_____

Date_____

Subject_____

LEARNING LOG
Use complete sentences in answering the questions.

1. What did you learn today?_____

_____

_____

2. What confused you?_____

_____

_____

3. What questions do you still have?_____

_____

_____

4. What did you find helpful about the lesson?_____

_____

_____

5. What was the point of today's lesson?_____

_____

_____

6. What connections to your life can you make from today's lessons?_____

_____

_____

{This log may be reproduced for classroom use}

The *Paragraph Writing Strategy* Manuals are Now Available

Two manuals are now available for teaching the *Paragraph Writing Strategy* to your students: an instructor's manual and a student lessons volume. The *Paragraph Writing Strategy* has been designed for use by students for organizing and writing paragraphs so they can respond more effectively to the complex writing demands in secondary and post-secondary settings. The instructional program contained in the two manuals enables teachers to teach their students the basic principles involved in paragraph construction. In Parts I, II, and III of the instructional program, students learn how to list ideas related to a topic, to plan the sequence in which ideas will be expressed, to develop a title for the paragraph, to write a variety of Topic, Detail, and Clincher Sentences, and to ensure that their sentences logically flow throughout the paragraph through the use of transition words. In Part IV of the program, students use a strategy for integrating all of these skills as they learn to write nine kinds of paragraphs. Part IV of the instruction in the *Paragraph Writing Strategy* can be integrated with instruction in the *Error Monitoring Strategy*. Thus, after each practice attempt where the student writes a particular kind of paragraph using the *Paragraph Writing Strategy*, the student can also practice using the *Error Monitoring Strategy* to detect and correct errors in the paragraph. Instruction in the *Paragraph Writing Strategy* is systematically sequenced so that the students have ample opportunity to practice identifying and writing the three different types of sentences (Topics, Detail, and Clincher) and different types of paragraphs. Instruction associated with Parts I, II, and III takes approximately four to six weeks. Instruction associated with Part IV can be interspersed with other strategy instruction as desired. The Instructor's Manual is available through the KU-IRLD, and the student lesson materials are available through Edge Enterprises. **Contact your local trainer for training on the *Paragraph Writing Strategy*.**

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