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Intervening in the use of strategies

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Introduction

This chapter summarizes current practice in implementing instruction in language learner strategies (LLS) which we refer to as strategy based instruction (SBI). Part Two of this book reviews studies into the effectiveness of SBI in relation to different skill areas. Here the focus is on the nature and purpose of SBI itself, although the chapter also offers a brief overview of this research. Four teacher educators describe SBI at two education levels: elementary and secondary (younger learners) and university, adult, and self-access centers (older learners). The purpose is to identify particular constraints at each level, whilst also highlighting a shared underlying pedagogical approach. Since the successful integration of SBI into the curriculum depends in no small part on the knowledge, understanding and skill of the teacher, the chapter concludes by discussing obstacles faced and the implications for teacher education.

What should a program of SBI look like?

A major outcome of the research into the strategies used by successful language learners is the conclusion that learners should be taught not only the language but also directed toward strategies they could promote more effective learning. As Rubin (1990: 282) points out:

Often poor learners don't have a clue as to how good learners arrive at their answers and feel they can never perform as good learners do. By revealing the process, this myth can be exposed.

Initial debates (O'Malley and Chamot 1990) focused on whether SBI should be a separate course or integrated into the usual language lessons, embedded in the materials or made explicit. Since that time, there has been an increasing consensus that a fundamental goal of SBI is to promote the development of learner self-management since research has shown that, unless learners select strategies in the service of some task, skill, and goal, they will not easily

find the most appropriate strategies and be successful (Gu 2003; Oxford, Cho, Leung, and Kim 2004; Rubin 2005). Hence the explicit development of metacognitive strategies, alongside cognitive strategies, is considered essential (Wenden 1999; Anderson 2002, 2005). For the same reason, although SBI has been presented separately from the language course itself, all evidence points to greater effectiveness, when promoting process (learning) and product (the target language) is done in an integrated fashion. In that way, the development of strategic knowledge and skills can be motivated by a specific learning concern which students have and can foster their ability to select appropriate strategies and be more successful in their learning.

What are the essential requirements of SBI?

A number of models for teaching LLS in both first and second language contexts have been developed. (See, for example, O'Malley and Chamot 1990; Oxford 1990; Pressley, El-Dinary, Gaskins, Schuder, Bergman, Alma, and Brown 1992; Cohen 1998; Chamot 1999; Chamot, Barnhardt, El-Dinary, and Robbins 1999; Grenfell and Harris 1999; Macaro 2001; Graham and Harris 2003; Harris 2003; National Capital Language Resource Center 2003, 2004.) The Cognitive Academic Language Learning Approach (CALLA) is one such model designed to increase the school achievement of students who are learning through the medium of a second language. The CALLA model fosters language and cognitive development by integrating content, language, and SBI (Chamot and O'Malley 1994; Chamot 2005). School districts in the United States that have implemented the CALLA model have focused on preparing and encouraging teachers to teach learner strategies to their students.

Common to all the models of SBI is a sequence of four steps so that, although initial instruction is heavily scaffolded, it is gradually lessened to the point that students can assume responsibility for using the strategies independently (Chamot *et al.* 1999):

- 1 raising awareness of the strategies learners are already using;
- 2 teacher presentation and modeling of strategies so that students become increasingly aware of their own thinking and learning processes;
- 3 multiple practice opportunities to help students move towards autonomous use of the strategies through gradual withdrawal of the scaffolding; and
- 4 self-evaluation of the effectiveness of the strategies used and transfer of strategies to fresh tasks.

The four steps are illustrated in the descriptions of SBI for younger and older learners that follow. The division into two age-related levels serves to highlight that SBI is not a mechanistic experience, neither for the learner nor for the teacher, but requires reflection and evaluation. Hence it is influenced by the learning context, the nature of the task, and each learner's style, goals and background knowledge.

Facilitating effective use of strategy knowledge in younger learners

The learning context

This section focuses on the teaching of strategies to school-aged students aged 6 to 17, whether learners of English or languages other than English, and as second or foreign languages. These two contexts are, of course, quite different in terms of cultural and linguistic background, goals and needs for learning a second language, and motivation.

In the United States, learners of English as a second language comprise both immigrants and children born in the US of immigrant parents. They come from diverse linguistic and cultural backgrounds, with the majority (about 80 per cent) having Spanish as their home language. Most of these learners are highly motivated and their educational goals are to be successful in school. Thus, their need is for academic language, especially literacy, to enable them to achieve academically in the content subjects of the curriculum.

As Dörnyei and Csizér (2002: 455) point out, in England and the United States, the world domination of English has resulted in ‘motivationally speaking, a losing battle’ for the study of foreign languages such as French and German. A large national survey of foreign language teaching in England conducted by the Nuffield Foundation (2000) notes that 9 out of 10 pupils drop second languages post-16 and motivation dwindles long before that. (See Graham 2004 for a full discussion.) At the beginning levels, the greatest challenge for foreign language students is to develop proficiency in social language, though at more advanced levels they also need academic language for reading, discussing, and writing about literary and informational texts in the target language.

Language learners in both second and foreign language contexts can benefit from using learner strategies, but they may need different strategies for achieving their learning goals.

Ways to raise younger learner’s consciousness of learner strategies

Learner strategy instruction begins with helping students become aware of what strategies are and which strategies they are already using (Cohen 1998; Chamot *et al.* 1999; Grenfell and Harris 1999; Macaro 2001; Chamot 2004). This consciousness-raising helps students begin to think about their own learning processes.

Teachers first elicit students’ prior knowledge about strategies and then help them identify their current learner strategies for different tasks. In order to address the issue of motivation, they also explore their students’ beliefs about learning and whether they believe that learning occurs as a result of effort, native intelligence, luck, or the systematic application of strategic techniques.

One effective way to find out what strategies students are already using is to ask them. The teacher initiates class discussions about strategies (perhaps

defining strategies as ‘special techniques for learning’) that students use for typical assignments such as learning new vocabulary, understanding what is read, or remembering how to make a request. As students describe their special techniques for learning, the teacher lists their contributions, then identifies and names the strategies, and asks the class how many students use each strategy. Students are often amazed to discover the variety of strategies used by their classmates, and this can motivate them to try out new strategies. It is often helpful to ask students to complete a learning task first, then discuss the strategies they used for it (see Grenfell and Harris 1999), while it is fresh in their minds.

For students who do not share the main language used in the classroom, the teacher needs to teach special vocabulary that will assist them in discussing their strategies. For example, words like ‘think’, ‘strategy’, and ‘learn’ may require native language translation or the assistance of a peer who is relatively proficient in both languages. Giving priority to these vocabulary words and concepts will help students begin to discuss their own strategies and approaches to learning.

Of particular relevance to younger learners are two of the options for awareness raising proposed by Macaro (2001). In the first, students are asked to recall the strategies they so recently used to learn to read and write their L1 and to relate them to the strategies used to learn French. The second draws on adolescents’ curiosity about their peers by inviting them to compare their strategies to those drawn up by students of a similar age group learning English as L2.

Initial learner strategy questionnaires were directed at the older learner (Cohen and Chi n.d.; SILL in Oxford 1990; Chamot *et al.* 1999) and it is only more recently that more accessible questionnaires for younger learners have been developed such as Cohen and Oxford’s ‘Young Learners Language Strategy Use Survey’ (2002). Their (2001) ‘Learning Style Survey for Young Learners’ uses a range of visual resources and practical exemplifications to enable learners to understand their own preferred ways of tackling the language learning task.

Ways to present learner strategies to younger learners

Younger students may initially find that strategies are rather abstract and difficult to understand. In the presentation step, teachers model how strategies can be used for a particular task to make them as concrete as possible. By modeling their own use of learner strategies, teachers are making their thinking public and sharing it with the class. This modeling is generally done by ‘thinking aloud’ while working on a learning task. Often strategies in checklists are presented in brief, generalized statements describing an action such as, ‘When I’m reading I like to visualize what is happening in the story’. However younger students may benefit from the teacher providing simple, concrete, personalized exemplifications such as, ‘Visualizing is a learner strategy. It helps me make sense of a story. If what I visualize doesn’t make sense in the

story, then I know that I need to check what I just read, because I probably misread something' (Chamot forthcoming). In this way, students can attach a name to a strategy and can understand when, why, and how it is used.

The use and limitations of think-alouds as a research tool are discussed in Chapters 5 and 7. Here the focus is on their use as a teaching tool. An example of a step by step approach to teacher's 'thinking aloud', geared to this level of learner (Chamot forthcoming: XX) follows:

[The teacher shows an overhead transparency of a reading text and says:]
I'm going to show you what I do when I read. I'm going to describe my thinking. The first thing I do is to look at the title. And I think, 'What is this story going to be about? What do I already know about this topic?'
[The teacher makes a guess about the topic and also describes some personal prior knowledge related to the topic.]
Now that I've made a prediction about this story, I'm ready to start reading.
[The teacher reads aloud, pointing to the words as she goes.] Oh, here's a word I don't know. [The teacher points to a difficult word.] What shall I do? Maybe if I read the next sentence it will give me a clue.
[The teacher reads on and uses context to make an inference about the meaning of the difficult word.]

Table 7.1 A teacher thinks aloud

After a few minutes of modeling by thinking aloud, the teacher engages the class in a discussion of the process by asking students to recall what she did first, second, etc. and why they think she did that. The teacher can then name the strategy ('Yes, I used the strategy 'predicting' to figure out the topic of the story').

The teacher then asks students to provide examples of when they have used a strategy and whether it worked for them. In other words, the teacher does not assume that any particular strategy is unknown to students. Some students might not know the strategy while others may already be using it. The focus is on *naming* the strategy and discussing how it can be used for different kinds of learning tasks.

An additional way to make strategies more concrete for younger learners is to provide visual reinforcement. For example, teachers prepare strategy posters with icons to represent each strategy. Some teachers have used toy tool kits with each tool labeled with a different strategy name to provide concrete examples of 'tools for learning'.

Ways younger learners can practice LLS

Besides teacher modeling, students also need extensive practice opportunities. Learner strategies are part of procedural knowledge and thus need as much practice as any other procedure or skill (Chamot forthcoming). In the begin-

ning stages of practice, teachers usually need to remind students to try the new strategies. However, as students become more familiar with the strategies, they themselves should gradually assume responsibility for using them.

Since a sense of self-efficacy¹ is a major component of motivation (see Graham 2004 for a review of studies) and yet younger learners have a limited linguistic repertoire, there is a particular need to build their confidence. For example, beginners can engage in activities that reveal that they are not entirely dependent on their restricted L2 resources but can draw on their prior knowledge of the topic and context. In their study of reading and listening SBI with 12–13 year old pupils, Harris and Prescott (2005) described how students were presented with a magazine advertisement for a computer game but with only the title and pictures showing. They were asked to predict both the content and the likely words they would find in the hidden section of the page. Macaro (2001) suggests that to model communication strategies such as intonation and mime, pairs of students are provided with a dialogue but can only use one word to convey each message. The rest of the class has to guess the meaning.

Most students need multiple practice opportunities with LLS before they are able to use them independently and appropriately without teacher prompting. Strategies can be practiced with any classroom learning task, provided it poses a degree of challenge—if the task is too easy, students will not need to use strategies. Activities that involve collaboration, problem-solving, inquiry, role-playing, and hands-on experiences also lend themselves to practicing new learner strategies, especially since interaction with peers offers an additional source of scaffolding (Donato and McCormick 1994). Younger learners may require more extensive opportunities for such pair and group work than older learners since, however hard teachers seek to describe strategies in readily accessible terms, students may be better at explaining strategies to each other than their teachers are. Any student can learn much during ‘think-alouds’ from observing the strategies their partner uses but adolescents in particular may be more convinced by each other’s positive opinion of the potential value of a certain strategy than the teacher’s exhortations to use it. A further advantage is that, in spite of outward appearances, these adolescent students may lack confidence and the principle of ‘think-pair-share’ can lead to more productive whole class discussions. Initial practice with new learner strategies requires extensive support and scaffolding from the teacher. This support should be gradually faded to reminders and eventually students should be asked to choose the strategies they plan to use for a task or to identify the strategies they used after completing a task.

Ways to promote self-evaluation with younger learners

Just as students need practice in using the strategies, they also need to practice the metacognitive strategy of ‘evaluation’ after trying out new strategies. This provides them with an opportunity to reflect on how they applied the strategies and how successful they were in helping them complete the learning

task. For example, teachers ask students to write down the strategies they used during an activity or assignment, indicate how each strategy worked, and note any personal adaptations of each strategy. They then guide a class discussion about the strategies that seemed most useful for the learning task. Many of the same activities used during consciousness-raising such as class discussion, writing learning logs, completing checklists can be used for students to evaluate their own use of strategies (Chamot *et al.* 1999). This phase is especially important in developing students' ability to reflect on their own learning and develop their procedural knowledge.

A further potential incentive well-suited to younger learners is a 'Strategy Progress Card' with a checklist of strategies on one side and space on the other for students to record their test results over the period of time allotted for the SBI, so that they have a concrete representation of their progress. As Chamot and Rubin (1994: 773) stress: 'if strategies are presented in such a way that learners perceive immediate success, they are more willing to use them'.

Once students are familiar with new cognitive and socio-affective strategies and have had opportunities to practice them, they generally find that certain strategies work better for them than others for specific tasks. Students differ in their approaches to learning and can be expected to have strong preferences in the types of strategies they like to use. At this point they should be encouraged to develop their own personal repertoire of effective cognitive and socio-affective learner strategies which work for specific kinds of tasks. Students should not be forced to use one strategy or another, but rather encouraged to build their repertoire so as to increase their tools for learning.

Ways to promote strategy transfer in younger learners

LLS research has shown that students often do not automatically transfer the strategies they learn in one context to a different situation (O'Malley and Chamot 1990; Davidson and Sternberg 1998). Typically they will restrict a learner strategy to the specific context in which that strategy was first learned, though students who have developed effective strategies in their L1 are more likely to transfer them to similar tasks in the L2 (García, Jiménez, and Pearson 1998). Teachers assist in strategy transfer in two ways: first by developing students' metacognition through explicit strategy instruction and, second, by discussing with students how they might apply a strategy in a different context. For example, in relation to access to academic language, the teacher might ask students to transfer the strategy that s/he taught them to a content subject class and then report back on its effectiveness in that class. Other approaches are to have students teach the strategies they are learning to a friend or sibling and then evaluate how effective they were in explaining and modeling the strategies to others. One class decided to develop a class book on learner strategy tips that would be passed on to students in the teacher's next class the following year. By showing students how to apply learner strategies in new contexts, teachers can help them develop skilled use of strategies with

different types of language and academic content tasks and the knowledge base to use them effectively.

As Cohen, Weaver, and Li (1998: 113) suggest, transfer can be encouraged not only across L2 task and text types but also across L1 and L2. They highlight the value of explicit instruction in facilitating transfer across languages, arguing against Kellerman's (1991) assertion that learners automatically transfer communication strategies from their L1:

some or many of the L1 strategies will eventually transfer on their own but explicit training may hasten the process along, as well as teaching some communicative behaviour that is not learned automatically.

Wenden's (1999) review of related studies indicated the key role played by metacognitive knowledge in facilitating such transfer.

To encourage them to transfer 'guessing from the context' across languages adolescent students in one foreign language classroom in England where the SBI was designed to foster transfer were given examples of complex terms associated with particular curriculum areas ('alliteration', 'particle', 'infrastructure') and then encouraged to discuss how they worked out the meaning (for example, guessing from context or prior knowledge of the subject area). They also explored roots of words common to English and French ('cent, corp, dent') and how these carried clues to meaning. Harris and Grenfell (2004) describe in more detail how the exploration of cross-disciplinary connections between English and L2 can illuminate ways in which secondary school learners in the UK context might understand and then take more effective control of their own language learning.

Issues in SBI for younger learners

Three issues that can become potential stumbling blocks in SBI for younger learners are the use of the L2 for SBI, the effect of multiple strategies combined with difficult texts, and insufficiently developed metacognition.

Harris and Snow (2004) and Macaro (2001) discuss whether, for younger learners, the declarative knowledge involved in SBI is best filtered through L1. They argue that reflecting on and verbalizing their own internal thought processes already presents students with a sufficient challenge and that the priority is to fully engage in L1 discussions both with the teacher and in pairs. A judicious mix of L1 and L2 can be used, however, in the instructional materials.

While the existing literature suggests a broad sequence of general steps to be followed, tensions may arise, particularly with younger learners, in establishing progression in SBI over a prolonged period of time. These relate to the choice of texts and tasks, the integration of the steps into the scheme of work and sustaining student motivation. Chamot *et al.* (1999: 99) warn:

If the task is too easy, students will not need strategies to succeed; they may therefore see strategies as a waste of time. However, if the task is too

difficult students may not be able to succeed even when they do use appropriate strategies.

As Oxford, Cho, Leung, and Kim's (2004) study suggests, an additional consideration is the adaptation of both task and text according to the learners' proficiency levels.

While the use of authentic materials enables students to perceive the immediate relevance of the reading strategies presented, and offers opportunities to teach strategies not apparent in contrived textbook texts, the combination of difficult authentic texts and a wide number of new strategies can place too heavy a burden on students' mental processing capabilities (Harris and Prescott 2005). An alternative approach entails a gradual progression starting with practicing a cluster of related strategies² that the teacher identifies as related through a brief initial activity and then proceeding with the usual lesson. A textbook passage then recycles the strategy clusters at the end of several weeks. Finally, once the students are comfortable with the use of the cluster of strategies within familiar contexts, extended group work encourages them to move from supported practice in the use of a limited number of strategies to deploying the full range independently and from reading textbook texts to tackling authentic material.

All SBI models suggest that students should plan what strategies to use for a task, monitor comprehension and production while the task is in progress, and upon task completion evaluate how well a strategy has worked, and actively transfer strategies to new tasks. That is, the models (explicitly or implicitly) advocate the development of learners' metacognitive strategies along with cognitive strategy instruction. However, it is generally acknowledged that metacognitive understanding is a developmental process and that younger children are not as fully aware of their own thinking and learning processes as are adolescents and adults (Hacker 1998). This poses a potential stumbling block in SBI for children, who have not yet developed full metacognitive abilities. While the L2 research on SBI with young children is sparse, there is some evidence of considerable variation in their ability to report on their own thinking and problem-solving with reading and writing tasks in the target language (Chamot 1999). In Chamot's (1999) LLS study of children in foreign language immersion classrooms, some children as young as six could describe their own thinking processes, but for most, this ability developed gradually over the six years of the study.

Facilitating effective use of strategy knowledge in adult, university, and self-access centers

The learning context

This section considers ways to facilitate effective use of strategy knowledge for adults who are learning a language in a variety of settings and with a variety of motivations. What is perhaps most critical to note about these

settings is that possibly more than with classes of school age children, within any one class of adults, learners' goals can be quite different. This difference can affect learner motivation and willingness to do more than the minimum to enhance learning. On the other hand, improving learning can often enhance motivation.

Variation in these settings include:

- 1 how much experience with language learning the student has had. This can range from people who have a strong academic background and extensive language learning experience to those who may have never studied a language or are not even literate;
- 2 what the consequences of not meeting a required language course are; for example from having to repeat a course to more pressing outcomes for adults who need a language for work and therefore may not get a cherished assignment or raise; and
- 3 whether the facilitator is a teacher or a counselor (as in a self-access center).

In the first case, unlike younger learners, those who have had considerable language learning experience have most likely acquired substantial strategic knowledge. However, they may need help with focusing on a few specific learning problems. Or, if the type of language they are learning is quite different (for example, one with a different script), they may need to acquire additional strategic knowledge to deal with new kinds of learning. If the learner has not had a successful language learning experience or if they do not have much experience with learning a language (despite the fact that they do well in other subjects), they will more than likely need to gain a great deal of knowledge about strategies and their own learning styles as well as learn how to manage the entire learning process.

The second case is related to the learners' goals and will directly affect motivation. (See Chapter 3.) When the goal is pedagogical, there can be considerable variation among learners. Many who take a *required* course are not very motivated and this can directly affect their receptiveness to efforts to facilitate their learning. On the other hand, students who are achievement oriented and want to earn a passing grade, will be more open to such efforts. Those adults for whom learning is clearly related to personal or life goals, especially related to career, are likely to be the most motivated and more open to learning about learning.

In the third case, the teacher has the opportunity to consider ways of providing the knowledge and skill of effective use of strategy knowledge to the whole group while at the same time making sure that individual learners gain what they need from the attention to process. In a self-access center however, while counselors can provide just the right amount of attention to address a learner's needs, they may also be constrained in the amount of time they can give an individual learner. The teacher or counselor needs to bear these considerations in mind when helping learners to use their strategic knowledge

and needs to ascertain (a) how much knowledge the learner has, (b) how to help learners identify goals that will serve to motivate their learning, and (c) how to make sure that individual needs are being addressed and that the learning is useful to them.

Ways to raise older learner's awareness of LLS

Just as with younger learners, awareness of LLS and how well they work for a particular task and for a learner's particular goal is central to the successful use of cognitive and affective strategies. The use of 'think-alouds' has already been discussed in the first section. In addition to 'think-alouds, of particular relevance for raising adult learners' awareness are questionnaires, focus groups, 'ask a question', journals, and reading about the topic. Each of these teaching strategies are first defined below and then a chart (Table 7.2) is provided describing advantages and disadvantages of using them to raise awareness.

Questionnaires Although these can be used with younger learners, care has to be taken to ensure the wording is accessible. In selecting a questionnaire, it is helpful to note that the closer the questionnaire is to the actual skill and tasks the learner needs to accomplish, the more useful it will be to the learner because it focuses on actual tasks. For example, the Survey of Reading Strategies (SORS) (Sheorey and Mokhtari 2001; Mokhtari and Sheorey 2002) is specifically designed to help learners become better readers and raise their awareness of reading strategies.

Focus groups In this activity, learners focus on a particular skill (for example, listening) and spell out the range of goals they might have (follow instructions, understand a soap opera, make some friends). Then students are divided into focus groups, with each focus group working on a specific goal and considering what *problems* they might have achieving this goal and what *solutions* they might use to address the problem.

Ask a question This is a very simple technique to draw attention to strategy usage. When a learner gets an acceptable response the teacher asks the learner to report how he/she came up with that answer. In this way, learners share the process and make it available to others.

Journals With their highly developed metacognitive skills, older learners can use journals as a way of promoting awareness of strategies, especially if they are done in a focused manner. Rubin (2003: 12) provides an example of the kind of questions to promote effective reflection. Such questions include: 'What problems do/did you have in class or with your homework? How did you deal with these problems? How well did these solutions work for you?'

Reading about the learning process There are several volumes written for learners that describe the learning process which adult learners can be encouraged to read in their own time. These can help tackle possible student resistance by promoting the idea that learners can take charge of their learning and consider which strategies work best for them and for their particular

problems (Brown 1991; Rubin and Thompson 1994; Paige, Cohen, Kappler, Chi, and Lassegard 2002).

Technique	Advantages	Disadvantages
1 Questionnaires	Material is ready to go; does not take a lot of time.	Hard to make clear how important it is for a strategy to be related to task, goal, and the learner's particular problem.
2 Focus groups	Can be directly related to goal and to learners' perceived problems; allows teacher to show how a strategy is directly related to a specific task.	Takes class time; teacher needs to be quite familiar with a range of strategies in order to debrief discussions.
3 Ask a question	Can be used at any time.	Learners may need prompting to access their strategies.
4 Journals	Very individualized; helpful for consciousness raising, for helping learners consider alternatives.	If used with a beginning class or individual, language of the journal is a consideration.
5 Reading about process	Very individualized, learners can read in detail as they need to. Can be done outside class.	Language level usually not appropriate for beginners, except where translated (see references).

Table 7.2 Advantages and disadvantages of awareness raising techniques

Ways to present and practice strategies

The adult learning context has both advantages and disadvantages. On the one hand the diversity of adult learners' goals and knowledge poses a particular challenge, and requires the development of a high level of learner self-management. On the other hand, the teacher can draw on adults learners' greater ability to articulate their thought processes and to work independently. In addition, self-access centers can provide more opportunities for individualized support than classes of younger children.

If teachers are trying to build strategy knowledge of cognitive or affective strategies, the instruction should always be in context, that is, it should be directly related to something a learner is having a problem with. Learners need to recognize where they have a pattern of errors and when they are ready to work on a problem. If strategies are presented in the kind of context in which learners have a need to know or are feeling overwhelmed by material, then the help offered will be more readily accepted. There are several ways to bring learners to the recognition that they might need help and that it might be useful to focus on the learning process. The think-aloud, focused journal writing, and focus groups with a particular skill and particular function,

can help learners begin to identify their individual patterns of problems and provide the opportunity for them to consider which ones they want to work on. Another way to help learners recognize their need for help is to consider problems after getting back an exam or quiz. It is at this time perhaps that learners are most aware of their need.

Since use of strategies varies by learner, by task, and by goal, presentation of strategies is in terms of possible usefulness rather than recommendation. There is no 'right' or 'wrong' strategy but rather one that works for the particular learner for the particular task and goal. The Aymara memory exercise (Cohen 1990; also in Paige *et al.* 2002) offers learners the opportunity to consider which kinds of mnemonics work best for them.

Some teachers find it useful in teaching a particular strategy or even set of strategies to follow the sequence described above for younger learners (modeling, describing the modeling, naming the strategy, providing examples of when they might have used a strategy and considering when it might be useful). However, it may be less productive for experienced adult learners if several learners in a class already know those strategies or use others that are more effective for them.

There are several think-aloud type activities used in presenting strategies which, although they can be used with younger learners, may be easier to use with adults. One is the 'think-aloud hot seat'. Teachers invite someone who seems to really grasp the notion of an effective strategy to model for his/her peers, so that they can see someone in their own class engaged in effective strategy use. Within this context, students often reveal strategies that teachers had not thought of.

The think-aloud protocol can also be implemented for one-on-one conferences with a learner. A teacher can learn a great deal about a learner by inviting him/her to do a language learning task while s/he watches. Then the teacher invites the student to talk about the strategies that he/she used while performing the task. This often helps learners who are struggling to overcome challenges to learning because they become aware of what they are doing and because the teacher makes suggestions to try out strategies to address their problems.

Teachers/counselors also help learners practice strategies, when they run into difficulty doing an activity, by reminding them of ones that have already met. Using a 'just in time' approach is very powerful because it meets a learner's immediate need and is not done in the abstract.

Ways to promote self-evaluation of strategy use

It is critical that learners develop their own repertoire of strategy knowledge, gaining an understanding of their own learning style, which strategies work best for them, and how to connect strategies to the task and goals they may have. Insights into what has worked for them in the past helps them do so and there are a range of ways to support them in developing the ability to self-evaluate. One technique involves encouraging learners to set goals in

advance for a particular task, identify which strategies might work for them, determine their criteria for success, and then notice after completing the task how well those strategies worked.

Kato (2000) used the following technique in helping her students of Japanese manage their learning. She asked them on a day by day basis to set the number of words they wanted to learn, to select one or more strategies to use to learn them, and then to determine whether they had done so. If they failed, they were asked to reconsider their goals (i.e. number of words learned), and the success of their strategies. It is worth noting that in order to consider success, learners' goals need to be very specific (not just number of words, but what does 'learning a word' mean? See Nation (2001) for an outline of ways of knowing a word) and they need know how to check their success, independent of feedback from the teacher.

Without an awareness of whether a strategy works for them, the learner is unlikely to see the benefit of using it so this phase of instruction is critical.

Issues in SBI for older learners

One issue, true of many ESL or other second language contexts, is that learners in a class may have many different native languages so that there is no common L1 in which to carry out the instruction. At the same time, learners may have limited target language abilities. A creative solution is to pair more advanced learners in higher level courses with those with more limited target language skills. More advanced learners can carry out some of the awareness work in the native language and then write it up as they would for a research report. In this way, they do three things at the same time: they raise the awareness of the beginning learners, they learn about the learning process and how to do research, and they learn how to write a research report. This approach was successfully used by Sharon McKay (personal communication) with a group of advanced, college-bound learners. The lower level learners were pleased to talk about their learning processes and exclaimed that 'no one had ever asked them'. The more advanced learners gained both in knowledge about the learning process but also about how to collect data and write it up.

Research into SBI

Research on the intervention or teaching of language learner strategies has been undertaken with the aim of exploring the extent to which it enables students to become more effective language learners. Issues have been raised, however, about the reliability and robustness of some of the studies (McDonough 1999). A recent review of strategy instruction in language learning identified a relatively small number of intervention studies that were truly experimental in design (Hassan, Macaro, Mason, Nye, Smith, and Vanderplank 2005), that is, studies in which the effectiveness of strategy instruction with a group of language students was measured against a comparable group of students who either received a different type of treatment or no treatment at all. Moreover,

of the 38 studies meeting the established criteria, only 11 were of younger, school-aged students, while 27 were of older learners. In general, Hassan *et al.* concluded that training language students to use learner strategies was effective in the short term, but there was no evidence of whether its effects persisted over time. This review also differentiated between the effects of learner strategy instruction in different language modalities, finding weak evidence for effectiveness of strategy training for listening, speaking, and vocabulary acquisition, but strong evidence supporting the teaching of learner strategies for reading and writing in a second or foreign language. A full discussion of many of these studies can be found in Part 2 of this book.

A smaller-scale review of intervention studies also found gaps in the research that should be addressed in future studies (Chamot 2005). It called for additional and rigorous intervention studies with a variety of language students, including children in foreign language immersion and non-immersion programs, school-aged students in bilingual and second language programs, older students with differing educational levels in their native language, and students in different learning contexts around the world. In addition, it called for research on the development of language teacher expertise for integrating learner strategies into their classrooms, including teacher characteristics such as teaching approach, attitude, and teacher beliefs. Suggestions for teacher education are discussed in the next section of this chapter.

An essential requirement for the accurate and reliable reporting of SBI is a careful description of the research and instructional methodology used, including details on what strategies were taught, how they were taught, the level of explicitness of the instruction, types of activities students were engaged in to practice the strategies, how the use of strategies was evaluated, the length of time the SBI took, and most importantly, whether the instruction included metacognitive awareness raising. Learner strategy instruction also needs to be assessed for its effects on language proficiency, not just on student self-report of strategy use.

An important direction in future LLS research is to examine whether any such improvement in performance coincides with changes in strategy deployment and in attitudes. A further avenue is the investigation of the longitudinal effects of strategy instruction. Once students have been taught to use learner strategies to facilitate their second language acquisition, do they continue using the strategies (or continue to develop their use of more sophisticated strategies) over time? Do they need periodic reminders of the strategies and ‘refresher’ courses?

Allied to the longitudinal issue is the transferability of learner strategies to new tasks. Research in first language contexts has shown that strategy transfer is often difficult, but that explicit instruction and the development of metacognitive awareness promote strategy transfer. There is limited research on transfer of strategies in second language acquisition, but new work in this area promises to provide insights that can help teachers teach for transfer (see Harris 2004).

Further directions for possible research are related to the distinction between younger and older learners drawn in this chapter. Cross study comparison of the impact of strategy instruction is rendered problematic by differences in learning settings, the periods of time over which it is undertaken and the nature of the SBI itself. Few studies indicate how the choice of skill areas and strategies has been tailored to meet learners' age, stage and proficiency level. Although Macaro (2001: 267) provides a brief overview of a possible SBI programme from Beginner through Intermediate to Advanced level, a number of issues related to progression bear further exploration. They might include:

- 1 The benefits and limitations of focusing on the strategies involved in one skill area as opposed to highlighting the overarching metacognitive strategies in any task the learner faces. Of the 38 studies selected by Hassan *et al.* (2005), 24 were in cognitive training, eight were in metacognitive training and the remainder in mixed strategy training. On the one hand, concentrating on one skill area may be less time consuming and more manageable for the teacher. But it is likely to reduce the learners' ability to perceive the potential for transfer. As O'Malley and Chamot (1990) conclude, the optimum way of grouping strategies to minimize potential learner confusion is an aspect of SBI that awaits further investigation.
- 2 The choice of skill area on the basis of the age and proficiency level of the learner. Harris *et al.* (2001) argue that vocabulary memorisation strategies may be suitable starting point for beginners and this is also implied in Macaro's (2001) overview. There appears however to be both a lack of discussion as to the possible criteria for the selection of a skill area and a lack of rigorously evaluated programmes, where each skill area is taught to the same group of learners over a prolonged period.
- 3 The selection of strategies within the particular skill area according to the age and proficiency level of the learner. While strategies drawing on sophisticated grammatical knowledge are clearly more suitable for advanced learners, other strategies are less readily categorised.
- 4 The relationship between the age, proficiency and motivation level of the learners to the optimum number of strategies to be taught over the course of the SBI and even the number to be presented in any one lesson.

Perhaps the most striking characteristic of strategic learners is that they are able to manage their own learning effectively. That is, they not only understand their own learning strengths and weaknesses, but are able to act on this knowledge to plan, monitor, and evaluate their language learning. Research is needed that can measure this ability to self-manage language learning and examine its relationship to a range of factors such as attainment, personality and attitude.

Teacher concerns and teacher education

A number of researchers have worked closely with teachers to guide them in incorporating SBI into their language classes. Even with close collaboration, there have been differences in the degree to which teachers have been able to successfully implement learner strategy instruction (Rubin, Quinn, and Enos 1988; O'Malley and Chamot 1990; Grenfell and Harris 1999; Macaro 2001; Chamot and Keatley 2003). Factors that may explain why some teachers experience difficulty in implementing learner strategy instruction include curriculum constraints, teaching style, comfort with current style, teacher beliefs, and lack of knowledge and skill in promoting strategies (Vieira 2003).

The curriculum may determine how much time teachers are willing to spend on SBI. Curricula with detailed standards and mandated assessments of these standards can make the teacher feel that there is no time to spare for 'extras' such as teaching strategies. In addition, some curricula effectively dictate the types of tasks undertaken in the language classroom. Tasks differ depending on whether the context is a second language or foreign language setting and whether the curricular goal is for learners to acquire social language or academic language or both (Cummins 2000; Chamot 2004; Cohen 2003; Oxford, Cho, Leung, and Kim 2004).

Teachers who prefer a transmission style of teaching may tell students to use strategies without investigating student preferences and prior knowledge about strategies. In this type of language classroom, strategies become one more thing that students must memorize rather than take an active and personal approach to learning.

Learners and parents of younger learners may also be more comfortable with the transmission style. Teachers report facing some resistance to strategy intervention both from students and parents. This is often based on their expectations of the teacher role and their beliefs about the learning process. As has been seen, it can be helpful to have learners read about the learning process to raise their awareness of the importance of being more active, or to hear how more successful learners manage their learning.

A further concern reported is the difficulty of providing individual support and advice when working with large classes (50 students or more). This calls for teachers to be highly creative in finding ways to promote the development of effective strategy use by putting learners into smaller groups or by using peer feedback.

In order to overcome these constraints and effectively promote the use of strategies, teachers themselves need to gain a great deal of knowledge and skill. Yet, how to teach strategies is not usually a topic studied in professional preparation programs for second language teachers. The major focus in such programs is on pedagogical techniques, lesson planning, and classroom management. They may study second language acquisition processes but this theoretical knowledge may not be translated into specific practices for helping

students become better language learners. Teachers usually become interested in learner strategies either through self-study, exposure in a professional development workshops, or collaboration on a LLS research project.

Most researchers (for example, see Harris *et al.* 2001) agree that, in order to support teachers in effective SBI, an active, experiential approach is necessary. This enables teachers to discover their own strategies, consider new ones, learn how to model and teach them, have many opportunities to practice and evaluate these teaching approaches, and plan how they will integrate strategy based instruction into the curriculum. As such, the process is similar to ones their learners should experience through the four SBI steps highlighted earlier in the chapter. In addition, just as learners need to self-reflect on how well they are learning and how well they are managing the learning process, so too teachers need to be clear about how well they are facilitating learners' ability to manage their learning. Anderson (2005) argues that in order to have metacognitively aware learners, we must have metacognitively aware teachers. A specific example of a checklist for reflection for language teachers is given below (Table 7.3). A more general education one can be found in Costa and Kallick (2004).

1	What were your goals?	
2	What were your evaluation criteria to know you have reached your goal?	
3	What teaching strategies will you use to accomplish your goal(s)?	
4	How much time will you need to accomplish your goal(s)?	
5	What problems arose while presenting the strategic knowledge?	
6	Identify any problem sources (your goals, your teaching strategies, your emotions, amount of time for presentation)	
7	Identify all problem solutions (adjust goal(s), teaching strategies, pace, your emotions, amount of time)	
8	Type of revisions you will make next time you teach strategic knowledge	

Table 7.3 Evaluating your success in teaching learner strategies

Chamot *et al.* 1999; Rubin 2001 and 2005, and Wenden 1995 suggest that it is critical throughout for teachers to engage in the overall process of planning, taking into consideration the task, the learner's goal and purpose, and encouraging them to establish a time-frame. This will involve task

analysis: for example considering the task classification and task demands. The process can then be further fine-tuned as learners become aware of how to enhance learning by monitoring, evaluating and considering the reasons for their success or failure and considering what changes they need to make to improve their learning process. To deploy strategies successfully, learners must use the strategies in a contextualized manner using their knowledge about tasks, skills, and background information in selecting strategies. They need to have well developed procedures of planning, monitoring, evaluating, and problem-solving, and to be flexible and adaptable so that when they encounter difficulties, they can come up with alternative solutions (Rubin 2005). For a teacher to be able to bring all this together, s/he needs a great deal of knowledge and skill.

Conclusion

This chapter has provided an overview of current practice in SBI, highlighted issues for a SBI research agenda and discussed the implications for teacher education. It has suggested that although SBI is tailored to different settings, there are common underlying principles:

- 1 Strategy intervention should be directly related to problems that learners are seeking to solve. This means that unless learners recognize that they have a problem and have the motivation to solve that problem, providing them with more strategic knowledge will not be well received.
- 2 Strategic intervention should lead to immediate and recognizable success. Since we know that motivation is critical in learning (Pintrich and Schunk 1996; Dörnyei 2005), and that feeling competent (self-efficacy) is a major component of motivation, learners should themselves directly feel that the knowledge given through strategy intervention is immediately and directly useful to them.
- 3 Since there is a great range of variation in learning, much as it might be simpler for the teacher and/or counselor, there is no such thing as 'one size fits all'. Teachers need to become more aware of the sources of variation (individual, group, cultural, and developmental⁴) and need to develop skills and knowledge to facilitate the learning process given this kaleidoscopic diversity.
- 4 Strategy intervention should include sufficient scaffolding, modeling, practice, and development of self-assessment. Providing just the right amount of scaffolding is more an art though some have suggested a sequence for evaluating the development of such knowledge (Sinclair 1999).
- 5 The amount of time it takes to develop a learner's ability to manage his/her own learning can vary tremendously. Some factors which can affect this are: a learner's beliefs about the teacher and learner roles, the teacher's skill in integrating strategy intervention with course material, and student disposition toward and already developed skill in learner self-management.

For many teachers, the element of time in promoting strategies can be an issue. Yet, the evidence discussed in this chapter and in Part 2 of the book suggests that if effectively done:

- 1 It increases ability to manage cognitive and affective strategies.
- 2 It increases learner motivation.
- 3 It increases performance.
- 4 It provides learners with the knowledge and skills to continue learning on their own. As Nunan (1996: 41) recommends: 'language classrooms should have a dual focus, not only teaching language content but also on developing learning processes as well'.

From the teacher's or counselor's perspective, promoting learner self-management provides a never-ending kaleidoscope of information and sharing so that, not only does the student gain knowledge and skills, but the teacher is also learning new ways to help students resolve their learning problems and be more effective learners.

Notes

- 1 Self-efficacy refers to a feeling of competence, that the learner knows how to accomplish the task. For a discussion of self-efficacy in general education, see Bandura (1995).
- 2 An example of the cluster would be: identifying cognates then using context to work out whether they are 'faux amis' or false cognates.
- 3 There are several sources for forms to use to promote this 'just in time' approach. See for example, the following: Chamot (1999), Riley and Harsch (2006) and Willing (1989).
- 4 Strage (1998) provides data showing that different kinds of parenting can affect a learner's willingness to become more independent.