Coming to Terms with Language Learner Strategies: What do Strategy Experts think about the Terminology and where would they Direct their Research?

by

Andrew D. Cohen
University of Minnesota

Working paper No. 12
July 2005

Abstract

This paper reports on the results of a survey questionnaire constructed and circulated among a group of second-language learner strategy experts to determine how they conceptualize and use the terminology in strategy research and practice. This paper provides highlights from the survey, as well as offering suggestions for conducting strategy instruction and indicating some directions for future learner strategy research which emerged from the survey questionnaire.

Introduction

This paper deals with concepts and current practice regarding language learner strategies, not by presenting a review of literature, but rather by reporting on the results of a survey questionnaire administered to a select group of scholars who represented some of the world's language learner strategy experts. In the summer of 2004, twenty-three international scholars who were significantly involved in the field of language learner strategies came together at Oxford University for three days to work together on the issues of learner strategies. Working groups focused on four themes: (1) strategy definitions and their relationship to other processes, (2) the role of learner strategies in their short- and long-term goals, (3) learner strategies as related to individual and situational differences, and (4) the dissemination of information about learner strategies to the end-users. An outgrowth of the deliberations was consensus that a questionnaire be constructed and circulated among these experts as a survey of how they conceptualize and use the terminology in language learner strategy research and practice.

This paper will first briefly describe how the survey questionnaire was constructed and administered, and how the data were analyzed. Then highlights from the survey results[1] will be presented in summary fashion, covering the following issues:

- Definitions of *strategies* and their prototypical features.
- Bipolar distinctions in the strategy field.
- Concepts related to learner strategies.
- The purposes for language learner strategies.
- The role of strategy instruction.
- Directions and methods for learner strategy research.

The issues to be discussed with regard to strategy research include determining the theoretical model for strategy research, designing longitudinally-based classroom- and out-of-class research studies, and selecting or constructing the appropriate quantitative and qualitative measures.

The Construction of a Language Learner Strategy Survey

As a co-organizer of the Oxford University meetings[2], I took it upon myself to construct a questionnaire that would attempt to capture, at least for the instant, the views of respected strategy experts concerning terms and issues in the language learner strategy field. The procedure that I followed was to read carefully a series of position papers that were posted on the closed Oxford University website set up to house documents for what was termed the International Project on Language Learner Strategies (IPOLLS). The website included position papers, PowerPoint presentations, discussions, and other products. The materials from which I was able to extract items for the survey questionnaire came from postings to the website by Ernesto Macaro,

[1] The complete report is available at the website of the International Project on Language Learner Strategies (IPOLLS) at Oxford University. Contact Ernesto Macaro ernesto.macaro@educational-studies.oxford.ac.uk.

[2] Along with Ernesto Macaro, Anna Chamot, Cathy Keatley, Vee Harris, and Do Coyle.

Peter Gu, Neil Anderson, Christine Goh, Joan Rubin, Carol Griffiths, Tsung-Yuan Hsiao, and myself. I did a content analysis of the terms used and the issues that were raised. I subsequently prepared in draft form a questionnaire meant to cover these key issues, plus others that were not in those papers but which seemed worthy of consideration. Then this draft questionnaire was circulated to all the IPOLLS participants for their feedback. Once feedback was received, the questionnaire was revised and posted on the IPOLLS website.

The questionnaire had eleven sections (see the Appendix for a copy of the instrument), which are represented here in logical order rather than in order they appeared in the questionnaire:

1. Indicate the kinds of literature you cite when giving a theoretical basis to your strategy work.
2. React to a definition of "strategies" intended to push the envelop a bit.
3. React to pairs of descriptors re the prototypicality of strategies.
4. Refer specifically to the role that distinct features play in the description of strategies.
5. React to pairs of possible terminological distinctions.
6. Indicate your understanding of concepts often related to the learner's use of strategies.
7. Indicate your agreement with statements concerning the purpose of learner strategies.
8. Indicate how crucial you think learner strategies are in successful language learning.
9. React to statements dealing with different aspects of strategy use (e.g., strategy instruction).
10. Respond to questions concerning your strategy instruction practices.
11. Respond to queries regarding research on language learner strategies.

Data Collection and Data Analysis Procedures

In September of 2004, the 23 colleagues who attended the Oxford University meetings were asked to respond to the IPOLLS survey questionnaire. In addition, one other colleague who was invited to the meetings but could not attend responded as well. Altogether, 19 language learner strategy experts responded to the questionnaire[3].

Given the length and complexity of the questionnaire, many of the respondents spent a good deal of time preparing their responses. Consequently, it took six months to collect all the responses, and in one or two cases, respondents responded selectively just to portions of the questionnaire. As the questionnaires were received, responses to each question were added in the appropriate box, with the initials of the respondent in order to track who said what. In the first stage of analysis all responses from the survey questionnaire were entered into a data base by question, producing a database

[3] The respondents included (in alphabetical order) Neil Anderson, Anna Chamot, Andrew Cohen, Do Coyle, Claudia Finkbeiner, Christine Goh, Suzanne Graham, Carol Griffiths, Peter Gu, Veronica Harris, Ernesto Macaro, Martha Nyikos, Rebecca Oxford, Joan Rubin, Osamu Takeuchi, Larry Vandergrift, Qiufang Wen, Cynthia White, and Lawrence Zhang.

of 60 pages of text. In the second stage, these responses were read carefully and those which seemed to best represent one or another position were grouped under the respective question. In addition, if the question called for a yes/no or agree/disagree response, then a numerical tabulation was also made as to how many respondents did or did not use the terms or concepts relating to strategies in a given way, or agreed or disagreed with a given statement.

In the third stage of the analysis, an effort was made to summarize the key statements in order to provide the set of findings provided below. Rather than providing a long string of quotes, an effort was made to paraphrase the respondents' comments as accurately and succinctly as possible. While the full set of responses to the questionnaire, along with the initials of each respondent, are available at the IPOLLS website, the survey report just integrated and paraphrased the views of the respondents, rather than reporting who said what. This way the focus was on the range of views. This paper presents just key highlights from the survey, following the logical ordering of the questionnaire tasks, as listed above.

What the results from this survey underscore is the paradox of learner strategy research. On the one hand, the field fascinates researchers and teachers alike, perhaps because there is a sense that the answer to language learning is bound up in the successful use of strategies. On the other hand, however, the field is still lacking consensus on a unified theory, with agreement by learner strategy experts on some concepts and definitions and not on others. This paper has as its goal to demonstrate how a survey of this kind can help identify the points of agreement and disagreement. Greater clarity about the points of major agreement and disagreement can serve to move the action along, and ideally bring about greater consensus as international experts are asked to articulate in areas for which they have clear views as well as in areas where they do not.

Results

The following are highlights of the findings for the eleven above-listed topics covered in the survey questionnaire.

1. **The literature cited when giving a theoretical basis to strategy work**

A wide range of fields were said to be consulted when making a case for the theoretical underpinnings of the L2 learner strategy work. The most cited fields were educational psychology, cognitive psychology, and cross-cultural psychology. In addition, information-processing theory, sociocultural theory, and social constructivist theory were mentioned. Language teaching and learning, along with individual learner differences were also mentioned. The field of neurolinguistics (e.g., neural functioning, associative memory, and brain chemistry studies) was mentioned not so much as a field of current study, but rather one that strategy experts would probably want to consult. Respondents also made more general reference to the fields of applied linguistics, sociolinguistics, and psycholinguistics. So there was a fair degree of consensus here, with psycholinguistics serving as the "base" discipline that most respondents seemed to turn to, but then they apply that discipline to a number of divergent areas of interest. The fact that experts in the field do not necessarily consult

the same research literature can help explain why at times they espouse differing terminologies in their learner strategy work.

2. Reaction to a provocative definition of "strategies"

The exercise of having the experts react to the same definition of learner strategies, as was done in this survey, provided an opportunity to see the level of consensus - definition:

> *Strategies can be classified as conscious mental activity. They must contain not only an action but a goal (or an intention) and a learning situation. Whereas a mental action might be subconscious, an action with a goal/intention and related to a learning situation can only be conscious.*

The responses to this questionnaire item illustrate why there is no one popularly-accepted definition. While three respondents accepted the definition fully, one agreed but felt more was needed. Others were not in agreement with most parts of it. With regard to strategies being "conscious," one view was that consciousness is not just one thing but actually involves intentionality, attention, awareness, and control (after Schmidt, 1994), which represent different levels of strategic involvement. Another view was that strategies have developed into routines at high levels of competence and are no longer conscious.

With regard to "mental activity," there were those who asserted that strategies are not always mental, but rather may be manifested in a physically observable form (e.g., "eating a rich dessert as a reward for studying hard for a language test"). As concerns "action," there were those who would argue that not all strategies must contain an action. They felt that having a behavioral component in a definition of strategy was problematic. In addition, there were a few who did not feel that all strategies had to have a goal. Finally, with regard to "learning situation," a concern was voiced as to the required degree of specificity in that some learners need more explicitness about which strategies might go with which task in a given learning situation than do others.

3. Essential features in the description of a strategy

The respondents were asked to read statements about features often associated with learner strategies and to indicate how much they agreed that these features must be present for the behavior to be called a strategy. These features are presented in descending order of agreement, with the features receiving the lowest level of agreement appearing last.

a. For a strategy to be effective in promoting learning or improved performance, it must be combined with other strategies either simultaneously or in sequence, thus forming *strategy clusters*.

There was relatively strong agreement with this statement (9-strongly agree, 5-agree, 3-undecided, 1-disagree). The experts generally felt that no single strategy can function well in isolation. Another respondent felt that while the notion of strategy combinations sounded sensible to him, the field had tended to describe strategies in an isolated fashion rather than in clusters. Several of the respondents were quick to point out that the use of strategy clusters would depend on the nature of the task. One of

these respondents contrasted a complex reading comprehension task, where a series of strategies would be needed to interact successfully with the text, with a less complex decoding task which could conceivably be completed with the strategy of "finding/applying patterns." But that respondent was quick to note that a strategy such as "using prior knowledge" would most likely be needed for virtually any learning task. Another respondent considered this clustering of strategies to be an irrefutable reality if we take a close look at the task-specific or situation-specific research. She drew upon her recent research with beginning French students in suggesting that strategies do not simply increase as a result of instruction, but rather that clusters of them change over time.

Among the undecided, one respondent did not feel that strategy clusters were always essential. Another felt that although strategy combinations are often used to even the simplest of tasks, the use of strategies in combination is not a necessary precursor to success. Finally, a dissenter insisted that learning is neither black nor white, and that some strategies work more effectively when combined with others into clusters or strategy chains, but that other strategies can work well without clustering.

b. Strategy clusters include and are *evaluated via a metacognitive strategy* or series of metacognitive strategies (which monitor and evaluate them).

As with the previous statement about strategy clusters, there was relatively strong agreement with this statement (9-strongly agree, 4-agree, 4-undecided, 1-disagree). One respondent commented in agreement that strategy clusters are complex and involve adding and shedding strategies often from moment to moment, in line with ongoing monitoring and evaluation. In her view, the bringing together of strategy clusters involves a high level of planning and orchestration which is the result of metacognitive strategies. Another respondent said that such strategy orchestration is what enables learners to distinguish the best strategies from the rest. Others felt that only some of the strategies in sequences or clusters receive metacognitive scrutiny and that not all learners monitor or evaluate their use of strategies, whether singly or in clusters.

c. A strategy's description requires the specification of a clear *goal, goals,* or *intentions*.

Most respondents agreed that strategies have a goal (8-strongly agree, 4-agree, 2-undecided, 3-disagree, 1-strongly disagree). Whereas a teacher or a researcher may be able to identify this goal, various respondents were not sure whether learners would be able to articulate that goal either because they may never have been conscious of their strategy use at that level of specificity in the first place or perhaps were no longer conscious of it. Those who disagreed with the statement felt that learners sometimes are not aware of a goal or goals but nonetheless use strategies, and that less successful learners do not have a clear goal for specific tasks or have very general goals (e.g., "to finish the book by English class").

d. A strategy must have a metacognitive component whereby the learner consciously and intentionally attends selectively to a learning task, analyzes the situation and task, plans for a course of action, monitors the execution of the plan, and evaluates the effectiveness of the whole process.

The majority of respondents agreed with this statement, with the strong view being that overall metacognitive control must be present in order to call any mental action "strategic" and that metacognitive strategies are the overarching strategies that determine the cognitive strategies that the learner will deploy. Nonetheless, there was a rather robust group of undecided and dissenting respondents as well (6-strongly agree, 5-agree, 4-undecided, 3-disagree). One of the undecided respondents noted that ideally every learning strategy should have a metacognitive component, but that in actuality this is not necessarily the case as less effective language learners use strategies repetitively, inflexibly, and inappropriately. One dissenting respondent expressed the view that it would mean mixing knowledge with procedures to claim that cognitive strategies have a metacognitive component, and another suggested that there may be metacognitive moments, but that they may be fleeting. Thus, if learners were to be stopped and asked for a metacognitive stock-taking, they might well be unable to reconstruct a description of the level of attention, the nature of the analysis, the exact plan intended, or the nature of the monitoring and evaluation. A third suggested that highly intuitive students may not need to go through a highly analytic sequence, but rather would consider the task (not analytically), recognize instantly the strategy what is necessary, and sense whether it is working.

e. A strategy's *potential for leading to learning* must be proposed, even if only at the level of an hypothesis. (So if "Putting a word into a sentence so as to remember it" is to be considered a strategy, then it must be made clear how doing this action will lead to learning.)

The majority agreed with this statement (6-strongly agree, 5-agree, 2-undecided, 4-disagree), and several even felt that it was "vital" to specify the relations between a certain strategy and its consequences in learning. One respondent noted that while we can only propose that the use of a given strategy will lead to learning in combination with other strategies, a researcher would need to provide an hypothesis regarding how a given cognitive action in combination with others in working memory can lead to (a) LTM development, and (b) the development of a skill in the long term. He offered "advance organizers in French L2 listening" as an example of the development of a skill over time. He noted that these advance organizers constitute a strategy cluster (e.g. "predict content," "identify possible French words that might come up," "beware of any *liaisons* which might derail you," "prepare to visualize certain parsed bits of language") + metacognition ("stay calm," "think about how you coped last time"). He stated that eventually this cluster would become relatively automatic and if the hypothesis were correct, should lead to improved listening.

One undecided respondent felt that including "potential for learning" as a feature would eliminate numerous behaviors which traditionally have been considered strategic but which do not involve making an effort to learn anything (e.g., using the cover strategy of "laughing at a joke that was not understood"). Another respondent interpreted this feature as referring more to how a **teacher** rather than a learner might view a strategy, yet she agreed that at some level it could be beneficial for learners to consider the appropriateness of a strategy for a given task, goal, and purpose.

Among those who disagreed with the statement, one respondent noted that especially less successful learners might choose a strategy for comfort sake rather than because of its effectiveness in learning – e.g., purposely committing only enough effort to language learning so as to get just a passing grade. Another felt that instead of

loading a strategy description with details such as how a strategic action might work cognitively, we need to go for simplicity and clarity. In addition, she felt that a strategic action might lead to learning in different ways for different learners.

f. Learners need to be explicit in a given learning situation about the action component (e.g. what they mean by "re-reading a text" or "rehearsing and memorizing" a dialog).

This statement drew a full range of reactions (4-strongly agree, 4-agree, 5-undecided, 5-disagree), starting with those who felt that since strategies are conscious, the learners should be able to state explicitly what a strategy such as "re-reading a text" actually entailed. Then there were those who while being in agreement with the intent of the statement, felt it was the job of the researcher to get to the bottom of what "re-reading a text" is since the action could have a number of possible goals. One respondent noted that while he had not in the past taken this kind of fine-tuned tack in his own investigations, the result had been the collection of fuzzy data where it was not exactly clear what the learner had actually done or why.

Among the undecided the opinion was voiced that whereas it is better if learners are able to articulate their strategic action since it helps their awareness and consciousness, it may take explicit strategy instruction and some practice to be able to do this. One of these respondents questioned what was meant by "explicit." She felt that while learners need to know what they are doing, the degree of explicitness required depends on the learner. For instance, if the strategy is, "I will ask myself questions while reading to improve my comprehension," numerous students could leave it at that, others who are more detail-oriented or who needs much more structure, might take the strategy to the level of specifying that they will ask themselves at least three factual questions per page and will look in the text for answers to them, while yet other students might break it down at a one-step-at-a-time level (processing the text on a paragraph-by-paragraph basis). Those disagreeing with the statement felt that learners are unlikely to make explicit statements to themselves about the strategies that they use, in part because they often do not have the metalanguage to do so.

So what emerges from this questionnaire item about explicitness is the conceptualization of a "strategy" as being a behavior which may change according to the given learner. Whereas some respondents seemed happier with "fixed concepts," others are happier with more fluid concepts. It is this notion of fluidity which is taken up in the next section dealing with prototypicality since it views the various strategy features in terms of their coreness along a particular continuum.

4. Descriptors regarding the prototypicality of strategies

Aside from considering the presence or absence of features as in the previous section, another approach was in terms of how prototypical the feature was. For this task, a construct of "strategy" was viewed not as an absolute, all-or-nothing feature but in terms of how far along a continuum a feature could possibly go before it stopped being descriptive of a strategy. Those responding to this questionnaire task (13 out of 19) were asked to indicate how well they felt a series of contrasting ends on a continuum would work for them in judging whether a behavior was more or less strategy-like. For most of the features, there was consensus that they merited being

included among those considered prototypical of a strategy (purpose or goal orientation, sequence of actions, focus of attention, degree of monitoring, deliberateness, extent of evaluation, and self-initiation). With regard to several other features (e.g., degree of observability and of planning), views were mixed as to whether they should be included since the loading for those features in a given strategy instance could predictably be negative or even off the continuum.

a. Purposeful/goal-directed ⇔ no clear goal

Most of those responding (10 out of 13) supported a continuum from more to less goal-oriented. They felt it worked fine for them because it was easy to decide if a process was motivated by a purpose. Purposefulness was viewed as the intentionality aspect of consciousness. All the same, several were in doubt, such as one who said he could envision strategies where the learner could not articulate a clear goal for using them and rather deployed them as a matter of expediency

b. As a sequence of actions ⇔ as a single action

There was general consensus among respondents that strategic behavior could fall along a continuum from a single action to a sequence of actions, with only one or two dissenting voices. Respondents generally felt that depending on the task at hand, sometimes one strategic action (e.g., "selecting a keyword mnemonic to remember a difficult vocabulary word") would be enough to handle the task, but for more complex tasks (e.g., "looking up a new word in a dictionary") a cluster of strategies would be needed.

c. As the focus of attention ⇔ with attention elsewhere

There was also relatively solid consensus for including "attention" as a feature on a continuum from "focus on" to "focus away." In contemplating this continuum, one respondent pondered the issue of just how much attention was necessary for a process to make it strategic. In the view of another respondent, we need to allow for the level of attention to shift during the strategic process. In other words, at the beginning of the process, the strategy might be at the center of attention, but as the plan is carried out, the strategy is then reduced to peripheral attention, then to a stand-by mode, and perhaps ultimately to a "no attention" mode. So that would give this a feature a potentially fluctuating nature, depending on the strategy being used by a given learner.

d. Monitored ⇔ unmonitored

While there was relative consensus that monitoring deserves status as a prototypical feature of a strategy, the concern was for the extent of monitoring likely to be found in actual strategy behavior. While one view expressed was that monitoring is a necessary dimension for a strategy, another view expressed was that the extent of monitoring would depend on the activity and that for some tasks, it might not take place at all for various reasons (e.g., on that particular task, engaging in monitoring would detract from task performance, such as in certain speaking tasks). Yet another view was that the extent of monitoring depended on the style preference of the learner. The respondent felt that since monitoring implied that learners were conducting an analysis of the effectiveness of a strategy while using it, this might be more true of more concrete-sequential learners than for intuitive learners, who might simply sense whether the strategy was working.

e. Visible to an observer ⇔ invisible to an observer

This feature received less acceptance than others in that it implies strategies are at various levels of observability along a continuum, while the view in this case was that there is a relatively large set of non-observable strategies that would therefore be off the continuum from the get-go. These would be those numerous strategies that involve mental processes which are not manifested as observable activities, but that may be accessible through investigation using verbal report or other means.

f. More deliberate ⇔ more automatic

This proved to be a problematic distinction. There were those who felt strongly that once a process is automatic, it can no longer be a strategy since in this context "automatic" means habitual and unconscious. There were others who felt that the execution phase of a strategy could, in fact, be automatic as opposed to being "controlled." And this led one respondent to question whether the appropriate opposite for "deliberate" was "automatic" after all. He felt that since for him "deliberate" meant "slow and careful," then the continuum would be from the learner being deliberate to experiencing a "flash of insight" (e.g., "I'll just use this strategy.").

g. Evaluated ⇔ unevaluated

While some respondents recognized "evaluation" as a necessary dimension for a strategy, they felt that in reality learners do not often reflect on how effectively they use the given strategy. Turning to the style preference literature, one respondent noted that some students will have evaluation as a clear post-task step, while other learners will not necessarily employ an end-of-task evaluation of strategy effectiveness, but rather will have an ongoing intuitive sense of whether a strategy is working.

h. Self-initiated ⇔ initiated by another source

Having a continuum to place "source of initiation" along emerged as a useful exercise since respondents saw this feature as being in flux with the source sometimes being the teacher, sometimes a peer, and sometimes themselves. Several respondents posited that there was likely to be a gradual movement from initially looking elsewhere for ideas as to strategies to use and then eventually coming to generate their own strategies. While respondents saw as potentially difficult identifying the actual source for strategies, they felt that tracking the types of strategies learners used and their source might nonetheless provide useful insights about the value of strategy instruction.

i. Planned ⇔ unplanned

While four respondents categorically accepted a planning continuum, others had a similar reaction to this feature as they had to the observability one, namely, that there is destined to be a large set of strategies that are virtually unplanned and so they would fall at the "unplanned" end of the continuum. While these respondents might thus consider the continuum irrelevant to their description, it could be argued that being "unplanned" is a useful descriptor for a strategy. As the view was expressed that some intuitive students are not planning as much as they are instantly understanding the task and knowing the strategy to use, such a continuum might be a

bit simplistic and in need of fine-tuning to really understand what planning the use of a strategy actually means.

5. Terminological Distinctions

One of the conspicuously problematic areas in the language learner strategy field is that it has been characterized by a myriad of terms that those in the field have used sometimes as synonyms and sometimes in opposition to one another. The questionnaire provided pairs of terms and sought to determine the extent to which these experts made the distinctions and derived value from doing so. The following is a report on some of these distinctions.

a. Language learning strategies vs. cognitive/learning style preferences

The distinction between styles and strategies drew a unanimous response in that all respondents (N=16) indicated making this distinction. *Styles* were seen as more permanent, usually coming from inborn preferences, while strategies could be learned. Whereas styles reflect the predisposition to do things a certain way, strategies were seen as the way a person operationalizes that predisposition. It was pointed out that while a learning style may determine the choice of certain learning strategies, students might intentionally style-stretch by using strategies that would not be predicted given their style preferences.

b. Strategies vs. processes

Most of the respondents said that they make the *strategies* vs. *processes* distinction (yes-12, not sure-2, no-4). They tend to see *processes* as general, subconscious or unconscious, and more automatic, whereas *strategies* are subject to control, more intentional, and used to act upon the processes. It was also found that some of the experts do not use "processes" but only "process" (e.g., rehearsal strategies are aimed at enhancing the rehearsal process).

c. Strategic knowledge vs. strategic action

Twice as many respondents indicated making the *strategic knowledge* vs. *strategic action* distinction than not (yes-12, no-6). Several of the experts pointed out that metacognition was comprised of two components: *declarative knowledge* and *procedural knowledge*, with *strategic knowledge* being part of declarative knowledge and *strategic action* being linked to procedural knowledge. Another respondent added that procedural knowledge drew from four general sources: knowledge about the tasks (their purpose, their type, the demand), oneself (learning styles, multiple intelligences, and motivation), background knowledge (about the domain, the culture, the language, the context, the given language text, and the world), and beliefs (about learning and about language learning) (see Rubin, in press). Several other respondents pointed out that having strategic knowledge does not guarantee that the learner can mobilize those strategies, especially if they are not part of their own "culture of learning."

d. Macro- vs. micro-strategies

While the majority do not tend to make the *macro-micro strategy* distinction (yes-5, sometimes-2, no-11), some of these respondents could see the advantages of doing so since such strategies could serve as "umbrella" strategies which incorporate "smaller" ones.

e. Direct vs. indirect strategies

The large majority of respondents from this group of strategy experts indicated that they do not make the *direct-indirect strategy* distinction (yes-4, yes/no-1, no-12). A respondent who had made the distinction some years ago commented that for the last ten years she has not felt the distinction to be helpful. Where a few considered cognitive strategies to be direct and metacognitive ones to be indirect, most felt that referring to metacognitive strategies as "indirect" strategies did not do justice to the importance of their role in effective language learning and use.

f. Tactics or techniques vs. strategies

For this contrast, the vast majority indicated not distinguishing among *strategies, tactics*, and *techniques* (yes-1, no-14). The one respondent who practiced this distinction indicated that it was very useful for her research on listening comprehension strategies because it allowed her to incorporate a cognitive/information-processing perspective that examines strategic behaviors as sets of internal cognitive procedures, whereby a learning *strategy* is a higher level cluster of learning *tactics* that work together to produce a unified learning outcome. According to this view, the learners' choice of tactics is guided by their strategy. A native Chinese-speaking respondent commented that she had used other similar distinctions but that it was not easy to find equivalent terms for "tactic" and "technique" in Chinese, which called up the whole issue of how language learner strategy terms transfer across languages.

6. Concepts often related to a learner's use of strategies

a. Autonomous language learning

While the clear majority used the concept of *autonomous language learning* (yes-14, sometimes-2, rarely-1, no-1), there was some diversity in terms of how the concept was applied. Generally, respondents reported using *autonomous language learning* to refer to learning which has as its ultimate goal to produce self-motivated students who take control of the "what, when, and how" of language learning and learn successfully, independent of a teacher, and possibly outside of the classroom without any external influence.

One respondent saw the value of defining "autonomy" at three different levels – (1) *autonomy of language competence*: the threshold level at which learners can say or write what they want to say or write, (2) *autonomy of language learning competence*: the level at which learners can deploy cognitive and metacognitive strategies consistent with or in place of the teacher's teaching approaches, and also without the immediate presence of a teacher, and (3) *autonomy of choice*: the learners' role in determining personal language goals, the designated purposes for learning the language and proficiency goals, and the extent to which the learner has input into the content and modality of the language curriculum.

With regard to problems encountered in using the term, a respondent noted that while *autonomy* (from the ancient Greek) literally means "self-regulation," the phrase "autonomous language learning" has over time gathered many new accretions of meaning, some of which are mutually exclusive (e.g., autonomy from a technical, psychological, sociocultural, or political-critical perspective; Oxford, 2003). In

addition, "autonomous language learning" was sometimes understood (or maybe misunderstood) to be counter to the values of certain cultures. As a case in point, another respondent indicated that the term *autonomous* was not amenable to the EFL context in Japan in that teachers regarded it as an excuse for abandoning teaching. A third respondent noted that while the field of language autonomy had turned to learners' narratives as a source of insights, she was not sure how having learners go through the process of telling their stories about language learning actually improves the product, namely, improving their language proficiency. Finally, a fourth respondent pointed out that *autonomous learning* is not the same as *strategic learning* in that a learner can work independently in a rote, non-strategic manner. She also noted that learners who are not effective autonomous learners may be very effective (and strategic) learners in a supportive group setting.

b. Self-regulation

The majority of respondents reported using the term *self-regulation* (yes-12, rarely-1, no-5). One identified the term as that used in the educational psychology literature and as synonymous with "self-management" (see below). Another said if she used it, it was referring to Vygotsky's concept of self-regulation, with his theoretical and practical focus on specific sets of learning behaviors that would be recognized today as cognitive, metacognitive, and social strategies. She added that numerous current experts see learning strategies as what students use to become more self-regulated in their learning. A third respondent indicated that grounding learner strategies in cognitive psychology does not allow for the recognition of the affective side of learning. He views *self-regulation* as a broader term that allows for both the cognitive and the affective side of strategic learning.

Various respondents alluded to a major difficulty in using this term, namely, that it is difficult to distinguish *self-regulation* from *autonomy*. In fact, two respondents indicated that they used "self-regulation" synonymously with "autonomy," with *autonomous* being used as an adjective to describe the self-regulating person or group. One respondent pointed out that for some scholars, *self-regulation* is now being used to more or less replace "strategy" as a term, but that doing so leaves unanswered the obvious next question, "What do learners **do** to self-regulate? (which is to use strategies)." Another respondent picked up on this same use (or misuse) of the term and viewed this use of self-regulation as being in conflict with the research and theory on learner strategies from cognitive and educational psychology.

c. Self-management

The majority of respondents indicated that they used this term (yes-11, no-7). For one respondent, learner self-management was the combination of procedures and knowledge. Another reported using the term to refer to learners who (a) use metacognitive strategies extensively to monitor, plan, and evaluate their strategy use, and (b) are able to control their own learning and seek/find solutions to problems in their learning. A third respondent similarly reported using *self-management* as a metacognitive strategy which can be applied to any learning task. She saw four components to the concept of self-management which included having learners 1) determine how they learn best, 2) arrange conditions that help them learn, 3) seek opportunities for practice, and 4) focus attention on the task.

Various problems were raised with regard to the use of the term. One respondent felt that while in her view all learning strategies reflect a form of learner self-management, some researchers in the field have used the term "self-management" to refer only to metacognitive strategies (as noted in the previous paragraph). In the strategy instruction sessions that she has led, this usage (limiting *self-management* to metacognitive strategies) has been confusing to the participants, especially to those teachers among them who were using the term more broadly. Another respondent saw *self-management* as a necessary but not sufficient prerequisite to strategic behavior. She viewed the concept as having some overlap with *self-regulation*, but she thought that the self-regulation was more inclusive of the range of strategic behavior – including both the **will** (i.e., the motivation to use *self-management*) and the **skill** (i.e., the ability to deploy both metacognitive and task-specific learning strategies).

d. Independent language learning

The term *independent language learning* drew a mixed response. Half of the respondents reported that they used it and half not (yes-7, sometimes-2, not often-2, no-7). Six of those indicating that they used it tended to use it as a synonym for *autonomous language learning*, which also says something about how they relate to the term *autonomous*. Another respondent said that she uses this term when she wants to focus on learners who are taking responsibility for their learning through independent study (e.g., in self-access centers).

As to problems with the term, one respondent felt that the term interfaced with autonomous language learning in sometimes ambiguous ways. Another respondent indicated that it was a problematic term in distance education because it was associated with a perception that learners can and should be independent, without sufficient attention being paid to issues of learner proficiency or support. In her view, independence needs to be balanced with an awareness of the abilities and competencies of the learner and with concern for the support available to learners to ensure successful learning experiences. A third respondent commented that while for some learners there is language material which is best learned independently, there is also material which certain learners best learn in an interactive social context.

e. Individual language learning

Most of the respondents reported not using the term *individual language learning* (yes-3, no-14). Two of those who reported using it, indicated that is serves for them as a synonym for *independent language learning*. According to one respondent, what makes the term problematic is the lack of clarity in comparing it to "independent" and "autonomous" language learning. Another respondent gave an interesting spin to the notion of "individual" language learning, suggesting that it could refer to personal or even quirky approaches to language learning. She was thinking of how some good language learners that she has encountered are reluctant to share their strategies with others out of a belief that their strategies are not good for anyone else because they are highly personalized.

7. Statements concerning the purpose for learner strategies

a. To enhance learning

There was general agreement that learner strategies have as a purpose the enhancement of learning (strongly agree-12, agree-5, undecided-1). In addition, one respondent stated that without strategies, conscious learning cannot take place. Another respondent commented that if we accept the distinction between language learning and language use strategies (Cohen, 1998), then learner strategies should be aimed at enhancing both learning and use of an L2.

b. To perform specified tasks

Most respondents were in agreement with the statement that learner strategies have as their purpose to perform specified tasks (strongly agree-8, agree-6, undecided-2, disagree-2), even though until now numerous strategies have been stated in broad, general, and even fuzzy terms. Several respondents noted that the selection of strategies will depend upon the task, with the understanding that some strategies would be appropriate for more than one task. Finally, one respondent felt that it was inappropriate to assume that learner strategies had as their purpose to perform specific tasks since it would be up to the individual learner to make that determination, and not something predetermined by the nature of the strategy.

c. To solve specific problems

Most respondents agreed that a purpose for strategies is to solve specific problems (strongly agree-7, agree-7, undecided-3, disagree-1). Another respondent gave an example of a problem in listening to the L2, namely, "not being able to understand a piece of spoken text easily," and noted that it would probably take more than just one strategy such as "perceiving and parsing a French phrase as **aieons* été or **ayons etait*," neither of which makes sense grammatically nor in terms of cohesion. In this case, he felt it would take other strategies to show that this first strategy was not useful in making sense out of the utterance. A dissenting voice commented that strategies are not necessarily aimed at solving problems and gave as an example the strategies for using filled pauses, which in his view, may not be intended to solve a problem at all.

d. To make learning easier, faster, more enjoyable

While most respondents agreed with the notion that strategies serve to make learning easier, faster, and more enjoyable (strongly agree-2, agree-12, undecided-3, disagree-1), they sometimes did so with reservations. On the positive side, strategies were seen to allow learners to develop more knowledge of themselves and of what they are about. This self-awareness aspect was what made learning for them more satisfying and enriching. Another respondent pointed out that at the beginning stages of strategy instruction students may (and usually do) perceive that incorporating new learning strategies into task completion takes more time and effort than just working on a task in their accustomed way. But then when the learning strategy pays off in greater success on the task, the students begin to find that the use of this strategy with the given task makes for truly easier, faster, and more enjoyable learning. On the more negative side, it was felt that overusing strategies or using them too much in isolation rather than in meaningful combinations could prove unhelpful and might lead to slowing down the learning process. It was also pointed out that there are strategies used in self-defense, which do not make learning easier, faster, or more enjoyable. It

was felt, in fact, that some strategies end up making learning more tedious, more complex, and slower (e.g., "finding L1 equivalents for all unknown words in a text before answer the reading comprehension questions").

e. To compensate for a deficit in learning

The notion of "compensating for a deficit" drew a range of responses with half disagreeing, some of them strongly (strongly agree-2, agree-5, undecided-4, disagree-3, strongly disagree-4). As one respondent put it, it depends on what we mean by "deficit." He noted that if someone were to give him an advanced text in Spanish to read (and he had only received a few hours of Spanish instruction), then he would compensate by using everything he had at his disposal such as other Romance languages, common sense, and prior knowledge of the topic (if he had any). However, if his task were to listen to spoken Spanish and he encountered phonological problems, he might not be able to use any strategy to compensate because he would not be able to hear the different sounds.

Among the numerous dissenters, one commented that the notions of "compensate" and "deficit" are a bit loaded for her, and do not capture the extent to which strategies can facilitate future learning. She did not view the use of strategies as a stop-gap measure, especially since she viewed learners as continuing to develop and refine their strategy use throughout their experience of learning a language, an aspect which the statement did not reflect. Another respondent felt that operating out of a deficit mentality or a medical model (i.e., to cure the sickness of ignorance) is what we have been trying to overcome for years. Finally, a respondent speculated that whereas many people would probably relate to strategy use in terms of deficit (e.g., ESL students need strategies to help with their "problems" in learning to speak, write, etc.), learners can be highly strategic without having a deficit or problem.

8. Indicate how crucial you think learner strategies are in successful language learning: "Without the use of learner strategies at all, it is impossible for someone to learn a language."

Those agreeing with this statement indicated that learners are using strategies all the time, although how systematically they use them, how much they fit the task or the student's learning style, and how effective their use is remain the key issues – issues which constitute the rationale behind the initiation of strategy instruction. The several disagreeing with the statement felt that there may be some strategies which are intuitive and subconscious and therefore strictly speaking may not be termed "strategies." So they would shy away from saying it is impossible to learn without strategies, but would consider it more difficult to do so.

9. Statements dealing with aspects of strategy use

a. What we have been referring to as strategies may actually be skills, or at least a combination of strategies interacting with one another. So, "summarizing a text" or "looking a word up in a dictionary" is not a strategy but a skill, operationalized through either a sequence of or a cluster of strategies.

While there was almost unanimous agreement with the view that strategies are sometimes confused with what are actually skills, one respondent felt that the relationship among combinations of strategies, processes, and skills still needs to be further developed. His view was that strategy clusters which are applied to a certain learning task constitute processes (e.g. "trying to understand a paragraph of text") that eventually become faster and develop into "constant" (reading) skills. Another respondent commented along the same lines by noting that for her "skill" suggests expertise and spontaneous use whenever the situation demands it. She felt that strategies used repeatedly and appropriately will become skills.

b. The strategies learners use and the effectiveness of these strategies depend on the learners themselves (e.g., their age, gender, language aptitude, intelligence, cognitive and learning style preferences, self-concept/image, personality, attitudes, motivation, prior knowledge), the learning task at hand (e.g., the type, complexity, difficulty, and generality), and the learning environment (e.g., the learning culture, the richness of input and output opportunities). We must view strategies within this larger framework to properly interpret their role in the language learning process.

While this statement about the impact of learners' background, task, and context on strategy use and effectiveness received almost uniform support, one respondent admitted that he himself rarely has considered all these factors and that to do so would be "mind-boggling." Another stressed that we need more research into the learners' own prior knowledge base in order to understand the extent to which their strategy use reflects group behavior or their own individual patterns.

10. Questions concerning strategy instruction practices

a. To what extent would you introduce and model strategies in response to specific incidents as they crop up as opposed to introducing them systematically according to a plan?

Basically, the respondents saw the advantages of both carefully planned and systematically-introduced strategy instruction (including task-based bottom-up and top-down strategies that are used as examples) and of responding to opportunities for unplanned strategy instruction as well. One respondent noted that he begins by introducing learners to strategies (through a strategy inventory of some type) and then introduces strategies systematically. Subsequently, he teaches strategies as they come up naturally, depending on the learning difficulties encountered by the class. A second respondent liked responding to specific incidents because students do not usually know if certain strategies are "legitimate," and so having the teacher discuss and perhaps model their use on the spot could be beneficial. A third added a caveat that the teacher needs to be very competent to do strategy instruction on the spot.

A fourth respondent who opts for a combination of the two would lead with a set of strategies (giving a lot of thought to just what that set would include – e.g., sample sequences and clusters of strategies for accomplishing certain popular tasks) and then also introduce and model strategies for dealing with specific tasks or incidents as well. A fifth colleague warned that teachers need to ensure that rather than being too much in the "explaining" mode, they provide their learners ample opportunity to try out strategies on a given task, to reflect on how they went about doing it, and to evaluate

how it worked. A sixth respondent indicated that while it is usually more effective for her to introduce and model strategies in response to a real task that the students encounter, as opposed to introducing them at specific times, she always tries to balance fluidity and spontaneity with an element of structure. She qualified her comment, however, by noting that if the class were composed primarily of concrete-sequential students who require more regimented or systematic instruction from an authority figure, then the highly systematic mode would be preferable.

A respondent who works in secondary education underscored the importance for her of planning the strategy instruction in advance – that things are "chaotic enough in schools as it is." Another respondent seconded this view by suggesting that the modeling of strategies in response to incidents is too haphazard, given all that we know about the need for extensive practice and the overall consensus in the literature about a series of steps from awareness raising to modeling, practicing, transfer, and then evaluation. This respondent also articulated four issues of particular concern in strategy instruction: (1) how to introduce a cluster of strategies in a lesson without creating a situation of overload, especially since each strategy may need further modeling and extensive practice, (2) whether/when to introduce authentic materials that may require full deployment of strategies as opposed to more contrived materials that tie in with the focus of instruction and which call for fewer strategies to process, (3) when to follow up once strategies have been introduced in response to incidents – that is, just when these strategies will be taken up again and systematically practiced, and (4) how strategy instruction is to be organized – whether, say, by skill areas (and if so, whether in progression from easier, more familiar strategies to more complex ones) or by function (metacognitive, cognitive, social, and affective).

b. How do we situate strategy instruction within culture? For example, assume that you are working with students who are learning the Spanish that they will use in a variety of different Latin American cultures.

A respondent who had never actually situated strategy instruction within a cultural context, saw this as a useful move. He suggested that we investigate the context-specific uses of strategies found there and avoid imposing general strategy use on learners who are situated in a specific context. A second respondent went so far as to recommend that the person conducting the strategy instruction be from the same cultural background as the learners. A third pointed out that he would start by raising the learners' awareness of certain cultural differences in terms of strategic beliefs and preferences since the aim is to stretch the learners' strategy repertoire in order to make strategy choice more flexible and appropriate. A fourth respondent suggested doing this contrastively, demonstrating the use of different strategies depending on the situation. He gave the example of deploying strategies to come across as more informal and direct when making a request in Madrid, Spain, vs. deploying strategies to be more formal and indirect when making the same request in Quito, Ecuador.

A fifth respondent stressed that strategy instruction must be at least somewhat relevant to the cultural beliefs about teaching, learning, and education that prevail in the culture of the language learners. If the strategies being considered are distant from their culture, then she felt bridges must be made or else the students will become lost, anxious, disinterested, or even angry. She also noted that differences among

students within a given culture does not justify ignoring culture. The bottom line for her was that strategy instruction must be adapted to fit within the given culture. The examples she gives are of how many Spanish-speaking cultures might want a warmer and more personal approach, whereas some academically-stratified cultures like Korea might want a strategy instructor who is more authoritative and more formal. A sixth respondent underscored the necessity of taking these cultural issues into consideration, such as how to incorporate strategies for spontaneous language use into strategy instruction with, say, Hong Kong students who do not speak out in fear of being disrespectful to the teacher. A final respondent addressed the importance of providing the rationale for using certain types of strategies such as metacognitive ones, since learners may come from cultures which have not traditionally favored such approaches.

c. Assuming learners differ in their awareness of strategies, how might you make sure to reach all learners? If there were, for example, a learner self-access website for strategy awareness raising, what materials/activities/screening devices/tasks would we want to have there to be sure to reach every learner irrespective of age, gender, language proficiency, motivation, language aptitude, short- and long-term goals, and cultural background?

The response from various experts was that it is unrealistic to expect a single website could cater to all learners on a self-access basis. Others felt that the only way to conduct fine-tuned strategy instruction was with an expert there to interact with the learners. In fact, one respondent specifically underscored the need for learners to be in conversation with instructors, ideally on a one-on-one basis at such a website, both in diagnosing their specific needs and in learning how to enhance their strategy repertoire. Another respondent felt that it would be beneficial to give learners the option to click on a native language button and get instructions in their L1 (with translations available for the major languages).

Several respondents felt that the website would have to include one or more style and strategy inventories with automatized scoring or easy self-scoring, and a task-analysis exercise so that learners could see their style preferences and strategy use patterns for real. The intention would be for learners to screen themselves and to gain awareness as to their style preferences and their current strategy repertoire. Then based on the results, the learners could ideally identify the strategies that might work best for them in dealing with various language learning and use tasks.

In addition, the consensus was that any such website would need to offer a whole range of strategies and a series of differentiated routes where learners go from initially determining their goals to identifying the most useful strategies for reaching those goals. It would ideally show the various strategies that learners could deploy in dealing with different language learning and use situations, and also suggesting the link between these strategies and the style preferences that may cater to the use of those strategies. It was suggested that the site include testimonials from successful users of strategies as to what works best for them, indicating when, how, and perhaps why. One respondent suggested that the website could first of all have activities that prompt learners to think about the strategies that they currently use by having them complete an L1 or L2 task. Then there would be staged activities that take learners step-by-step through strategy application, involving a set of fine-tuned strategies with

concrete examples that talk learners through it. Lastly there would an evaluation stage, where learners compare their results in language learning when using that set of strategies to their results without doing so.

11. Queries regarding research on language learner strategies

a. Do you or would you use verbal report in your research and if so how? For example, how explicitly do you/would you prepare your respondents? How intrusive are you/would you be in the data collection process?

The respondents reported relatively frequent use of verbal report in their research efforts in its varying forms. Often think aloud (i.e., reporting what one is thinking while doing a task without analyzing it) was seen to be preferable, but sometimes introspective and retrospective self-observation (i.e., analyzing what one is doing or did on a specific task) as well as self-report (i.e., reporting what one tends to do) were reported to be used as well. Respondents indicated that these verbal report sessions might also include interviews where respondents can further interpret and clarify their verbal report data. Several reported collecting strategy journals from learners every week as a means of obtaining retrospective data about strategy use. One respondent reported using a somewhat indirect means of collecting self-report data by having the respondents pretend to give advice to a fellow learner based on what they would do: "Imagine a student has come to you who has a bit less knowledge of the language than you do. She wants to know how you go about this. What would you say?" She indicated she also uses prompts such as "Can you take them through the task?" – as a means of getting more self-revelation. In addition, she might use "They're stuck at this point – what help could you give?" as a probe for a specific aspect.

There was consensus that it is important to provide the respondents with explicit models of the kinds of data they are expected to produce. While the respondents noted the trade off between preparing the respondents too much vs. providing too little, they all noted the value of providing such guidance. A respondent working with young children reported using Chamot's idea of toy animals in a bag, where she and her colleagues model verbal report, then have pupils put their hand in a bag and try to guess which animal it is, thinking aloud as they do so (e.g., "It's got 4 legs – I think this is a tail"). From there, they proceed to modeling think alouds with a language task. Another respondent considered it important with younger respondents to make the initial phase of the data collection process non-intrusive (e.g., general prompts such as "What are you thinking?"), and then in a subsequent session to use specific prompts (e.g., "When you are reading and you come to a new word, what do you do?"). In addition, if strategy instruction has been conducted before the verbal reports, it is possible to ask students to name and describe the strategies that they have just used for a task.

Whereas the respondents expressed a desire not to be too intrusive, prompting was sometimes considered imperative, especially with younger respondents, but always with the challenge not to "overprompt." Respondents noted that getting learners to think aloud may be a challenge, and that it was easier to obtain retrospective self-observation or self-report data from verbal report sessions. One respondent said that the solution here was to do cycles of elicitation with some of the same learners as well

as with new learners, where each cycle informs the next. With regard to the results of verbal report, one respondent was candid in suggesting that he experienced varying degrees of success. In focusing on listening in his verbal report work, for example, he noted that he could only tap part of the process.

b. How might you establish a tangible link between the use of a strategy or strategy sequence or strategy cluster and a particular learning outcome?

The respondents saw this as a real challenge. One respondent noted the need to link the learners' report of their strategy use (whether with individual strategies, strategy sequences, or strategy clusters) as closely as possible to language performance, in whatever manner it was being assessed. This desired strategy use-performance link also raised for this respondent the issue of just what performance consisted of and how it was being measured.

Those respondents who mentioned data analysis were prone to use correlational analysis, correlating the respondents' report of how frequently they used a given strategy in performing a given task with one or more learning outcome variables. It would also be imperative to explain and show in as much detail as possible how the use of the strategy or strategies leads to improved performance. One respondent called attention to the error variance involved in such statistical analysis, given that students may not be reporting their strategy use accurately and the performance measure may be somewhat flawed (e.g., the scales used for rating, the ratings themselves, etc.) Several respondents noted that it is possible to use convergent means of validating the results, such as by complementing the learning outcome measure with both classroom observation and also retrospective interviews with the respondents.

c. What are some cost-effective means for follow up to determine the long-term benefits of strategy instruction?

The respondents saw the investigation of long-term benefits to strategy instruction as a challenging task – namely, keeping expenses down, controlling all other variables aside from those related to strategy instruction and to learning outcomes, and keeping tabs on students who move out of the area. It was seen as a task that would entail the use of varied measures, such as interviews (to track how learners have incorporated strategy training into their daily learning), learner journals and portfolios, written questionnaires (with both closed and open-ended questions), and language performance measures. The key would be to administer these measures at regular intervals (e.g., every semester) to determine the relationship between strategy use and outcomes over time. Ideally, there would be a comparable group of subjects who do not receive strategy instruction. Phone interviews and on-line questionnaires were suggested as possible means for administering delayed post-measures, especially to subjects who are no longer within easy access of the research venue. Having periodic focus groups would be possible in the case where subjects remain in proximity to the research site.

One respondent stressed how important it is for the researchers to establish a solid relationship with the learners if the intention is to follow them as they progress in their various school or university settings, and then in subsequent work contexts. She

also suggested that it might be useful in longitudinal work to focus on a particular area of language learning, and then to have students both perform tasks and provide verbal reports to see if there are long-term benefits. Another respondent called attention to the need to delay the follow-up investigation long enough to get the effects of the strategy instruction out of their system and then to see if the strategies remain.

Discussion

This survey is perhaps the first of its kind in the area of language learner strategies, so for that reason, it constitutes a valuable undertaking. There are advantages to probing so many areas related to strategies among a group of learner strategy researchers and practitioners engaged both in theory building and in strategy instruction in the field – namely, it is possible to determine areas of consensus and areas where there is a difference of opinion. It would appear overall that the areas of consensus outweighed those of disagreement.

With regard to the specifics, the first insight was that strategy experts are accessing the professional literature from different fields, which helps to explain some differences in approaches and perspectives. Secondly, it is still a matter of debate as to how conscious of and attentive to their language behaviors learners need to be in order for these behaviors to be considered strategies. While there was consensus that learners deploy strategies in sequences or clusters, there was some disagreement as to the extent to which a behavior needs to have a mental component, a goal, an action, a metacognitive component (involving planning, monitoring, and evaluation of the strategy), and a potential that its use will lead to learning in order for it to be considered a strategy. So, in essence, two contrasting views emerged, with each having its merits. On the one hand there is the view that strategies need to be specific, small, and part of a combination related to a task, and on the other, the view that strategies need to be kept at a more global, flexible, and general level.

Again on the side of consensus, the distinctions between styles and strategies and between strategies and processes were generally accepted. In addition, there was general agreement that certain distinctions which had seen their day were now essentially discarded, like that between direct and indirect strategies, and the distinction among strategies, tactics, and techniques. There was also general consensus that terms like autonomy, self-regulation, and self-management, independent and individual language learning related in systematic ways to a learner's use of strategies. For example, the respondents generally felt that whereas the use of learner strategies can lead to enhanced autonomy, being an autonomous learner does not necessarily imply that the learner is drawing selectively and effectively from a refined repertoire of strategies. There was, however, less consensus concerning the interrelationship of these concepts to one another. Autonomy and self-regulation were seen to overlap and conflict in some ways. Self-management appeared useful but overlapped with self-regulation. Independent language learning was used by some of the respondents but also seen to overlap with autonomous language learning, and individual language learning was not reported to be used much at all by this group.

With regard to the purposes for language learner strategies, consensus was found for the view that strategies are for enhancing performance in language learning and use in general and in specific tasks, as well as for the position that strategies are used to help make language learning easier, faster, and more enjoyable. There was also enthusiastic agreement for the view that strategy use and effectiveness will depend on the particular learners, the learning task, and the environment. The experts were found to be less likely to see strategies as compensating for a deficit, so the deficit notion of language strategy use seems to have fallen a bit out of favor.

Finally, the survey produced a series of useful descriptions of approaches to strategy instruction, with views of respondents both corroborating those of colleagues and complementing them. In addition, the survey provided some useful suggestions both for learner strategy research practices and for future research directions in the field.

A few limitations of this study should be noted. One limitation was that given the nature of the survey instrument, this chapter reports on "sub-beliefs" from given respondents on specific issues on the questionnaire, and thus does not reflect the whole picture of how these issues interrelate for those respondents. Another limitation is that it was not always perfectly clear whose perspective was being represented in the various questionnaire statements – whether it was that of the learner, of a teacher, of a teacher developer, or of a researchers (e.g., #3e regarding the need to state the hypothesis for how a strategic action will lead to learning). A third limitation was the challenge of using general education terminology (e.g., terms like "learning context" and "task") across such a wide educational spectrum as that represented by the experts participating in this survey. Then add to this terminological problem the issue of how terms originating in English might be translated into other languages. A native Chinese-speaking respondent, for example, commented that she did not find it easy to locate equivalent terms for "tactic" and "technique" in Chinese. Since seven of the nineteen respondents on the questionnaire were nonnative speakers of English, this could have influenced respondents' reactions to the terminological issues.

In conclusion, conducting this survey brought numerous issues to the attention of the expert respondents, and in the process of completing the questionnaire the respondents identified lines of investigation that would need to be pursued to gather the kinds of information that could help resolve some of the issues raised. In various instances, experts noted that they simply had not considered some of the issues raised. So raising them in the questionnaire served the important purpose of consciousness raising. The next step would be to investigate some of the debated strategy features to determine more rigorously the extent of their role in language learning and use.

References Cited

Cohen, A. D. (1998). *Strategies in learning and using a second language.* Harlow, England: Longman.

Cohen, A. D. & Macaro, E. (In preparation). *Language learner strategies: 30 years of research and practice.*

O'Malley, J. M. & Chamot, A. U. (1990). *Learning strategies in second language acquisition*. Cambridge, UK: Cambridge University Press.

Oxford, R. L. (2003). Toward a more systematic model of L2 learner autonomy. In D. Palfreyman & R. C. Smith (Eds.), *Learner autonomy across cultures* (pp. 75-91). Basingstoke, England: Palgrave Macmillan.

Rubin, J. (In press). The expert language learner: A review of good language learner studies and learner strategies. In K. Johnson (Ed.), *Expertise in second language learning and teaching.* New York: Palgrave Macmillan.

Schmidt, R. (1994). Implicit learning and the cognitive unconscious: Of artificial grammars and SLA. In N. Ellis (ed.), *Implicit and explicit learning of languages* (pp. 165-209). London: Academic Press.

Appendix

IPOLLS Language Learner Strategy Questionnaire

Constructed by Andrew D. Cohen (September 2004)

Introduction

The aim of this questionnaire is to gather information as to how scholars, researchers, and experienced teacher/researchers perceive and deal with language learner strategy terminology and how they have responded to, or would respond to, various needs associated with strategy work. It will take a fair amount of time to respond to, perhaps involving several sittings. Hopefully, your investment in time will be worth the effort, so we thank you in advance for your willingness to aid us in this endeavor! Note that *language learner strategies* is being used as a generic way of referring to that broad set of strategies that include a panoply of language learning strategies and language use strategies.

1. Do you make (or would you make) any of the following distinctions, and/or do you see value in doing so?

1.1 *Strategies vs. processes*

Do you make this distinction?	*If yes, why?*

1.2 *Macro-* vs. *micro-strategies*

Do you make this distinction?	*If yes, why?*

1.3 *General* vs. *specific* strategies

Do you make this distinction? *Type Y or N below:*	*If Yes, why?*

1.4 *Direct* vs. *indirect* strategies

Do you make this distinction? *Type Y or N below:*	*If Yes, why?*

1.5 *Primary* vs. *support strategies*

Do you make this distinction? *Type Y or N below:*	*If Yes, why?*

1.6 *Tactics* or *techniques* vs. *strategies*

Do you make this distinction? *Type Y or N below:*	*If Yes, why?*

1.7 *Overt/motor* strategies (e.g. writing short summaries in the margin while reading a text) vs. strategies involving *thought processes* (e.g. connecting a visual image with a word)

Do you make this distinction? *Type Y or N below:*	*If Yes, why?*

1.8 Strategies as *intention to act* vs. strategies as *action itself*

Do you make this distinction? Type Y or N below:	*If Yes, why?*

1.9 *Strategic knowledge* vs. *strategic action*

Do you make this distinction? Type Y or N below:	*If Yes, why?*

1.10 *Language learning strategies* vs. *cognitive/learning style preferences*

Do you make this distinction? Type Y or N below:	*If Yes, why?*

2. Which of the following concepts do you use as a key term in your work, how do you use them, and what problems do you encounter (if any)?

2.1 Self-management

Use it? (Y/N)	*If Yes, how?*
	Problems encountered:

2.2 Self-regulation

Use it? (Y/N)	*If Yes, how?*
	Problems encountered:

2.3 Autonomous language learning

Use it? (Y/N)	*If Yes, how?*
	Problems encountered:

2.4 Independent language learning

Use it? (Y/N)	*If Yes, how?*
	Problems encountered:

2.5 Individual language learning

Use it? (Y/N)	*If Yes, how?*
	Problems encountered:

3. What literature do you cite when you need a theoretical foundation for learner strategies (e.g. from psychology, linguistics, etc.)?

Your response:

4. Please give your reaction to the following definition of strategies:
Strategies can be classified as conscious mental activity. They must contain not only an action but a goal (or an intention) and a learning situation. Whereas a mental action might be subconscious, an action with a goal/intention and related to a learning situation can only be conscious.

Your reaction:

5. In considering the features that constitute what is referred to as a **strategy**, to what extent would you say the following must be present for it to be considered a strategy? *For each feature, please type Y in the box below the statement that corresponds to your level of agreement and explain your view in the space provided.*

5.1 A strategy's description requires the specification of a clear *goal or goals or intentions*.

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.2 Learners need to be explicit in a given learning situation about the action component (e.g. what they mean by "re-reading a text" or "rehearsing and memorizing" a dialog).

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.3 A strategy's *potential for leading to learning* must be proposed, even if only at the level of hypothesis. (So if "Putting a word into a sentence so as to remember it" is to be considered a strategy, then it must be made clear how doing this action will lead to learning.)

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.4 A strategy must have a metacognitive component whereby the learner consciously and intentionally attends selectively to a learning task, analyzes the situation and task, plans for a course of action, monitors the execution of the plan, and evaluates the effectiveness of the whole process.

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.5 For a strategy to be effective in promoting learning or improved performance it must be combined with other strategies either simultaneously or in sequence, thus forming *strategy clusters*.

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.6 Strategy clusters include and are *evaluated via a metacognitive strategy* or series of metacognitive strategies (which monitor and evaluate them).

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.7 Metacognitive strategies subsume *affective strategies* as the latter require knowledge of oneself as a learner through recurrent monitoring of one's learning.

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

5.8 *Social strategies* are clusters of cognitive and metacognitive strategies. (If students of an L2 seek out interaction with native speakers of that language in order to improve their learning, perhaps overcoming fear and shyness, they are not, in effect, doing anything other than deciding on a plan of action based on a cluster of strategies.)

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

6. Please give your reaction to the following statements:
6.1 What we have been referring to as **strategies** may actually be **skills**, or at least a combination of strategies interacting with one another. So, "summarizing a text" or "looking a word up in a dictionary" is not a strategy but a skill, operationalized through either a sequence of or a cluster of strategies.

Your reaction:

6.2 It may be beneficial to do fine-tuned strategy training such as noting how combinations of strategies work in consort (e.g. strategies for looking up a word in a dictionary).

Your reaction:

6.3 When conducting learner training, be aware that focusing on a given strategy may inhibit the learner's use of another strategy, to the detriment of a positive outcome.

Your reaction:

6.4 While strategies may be initially suggested and modeled by a teacher, their selection and implementation is self-initiated by learners.

Your reaction:

6.5 While various metacognitive components of strategies are realized intentionally (e.g. selective attention, analysis of the situation, decision making, monitoring and evaluation of the strategic plan), the process of actually executing the strategy becomes quicker and more automatic so that the learner has no conscious control over it.

Your reaction:

6.6 The strategies a learner uses and the effectiveness of these strategies very much depend on the learner him/herself (e.g. age, gender, language aptitude, intelligence, cognitive and learning style preferences, self-concept/image, personality, attitudes, motivation, prior knowledge), the learning task at hand (e.g. type, complexity, difficulty, and generality), and the learning environment (e.g. the learning culture, the

richness of input and output opportunities). We must view strategies within this larger framework to properly interpret their role in the language learning process.

Your reaction:

6.7 Strategies aimed at learning or using language also involve data management issues such as storage of the material (which involve memory) and retrieval of it.

Your reaction:

7. Describing strategies prototypically rather than categorically

Let us assume you consider the features of language strategies in terms of how close to the prototypical core they are. Below you will find a set of characteristics in a continuum, which are meant to assist you in this effort of determining how strategy-like a given manifestation of a strategy actually is.

7.1 Please indicate in each box just how well you think that dimension might work for you in this task of determining the prototypicality of strategies.

More strategy-like	*Less strategy-like*
Purposeful, goal-directed *How well it might work:*	No clear goal *How well it might work:*
Planned *How well it might work:*	Unplanned *How well it might work:*
Self-initiated *How well it might work:*	Initiated by another source *How well it might work:*
More deliberate *How well it might work:*	More automatic *How well it might work:*
As the focus of attention *How well it might work:*	With attention elsewhere *How well it might work:*
Monitored *How well it might work:*	Unmonitored *How well it might work:*
Evaluated *How well it might work:*	Unevaluated *How well it might work:*
As a sequence of actions *How well it might work:*	As a single action *How well it might work:*
Visible to an observer *How well it might work:*	Invisible to an observer *How well it might work:*

7.2 What dimensions would you leave as is? Which would you change and if so, how?

Your response:

8. What are learner strategies for?

Please indicate the extent to which you agree with the following five views.

For each statement, please type Y in the box below the statement that corresponds to your level of agreement and explain your view in the space provided.

In essence, learner strategies are:

8.1 aimed at enhancing learning

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

8.2 for performing specified tasks

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

8.3 for solving specific problems

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

8.4 for compensating for a deficit in learning

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

8.5 for making learning easier, faster, more enjoyable

Strongly agree	*Agree*	*Undecided*	*Disagree*	*Strongly disagree*
Explanation:				

9. What are your reactions to the following two statements?
9.1 "Without the use of learner strategies at all, it is impossible for someone to learn a language."

Your reaction:

9.2 "It is possible for someone to learn a language without the use of learner strategies, but it is more difficult that way."

Your reaction:

10. With regard to learner training:
10.1 To what extent would you introduce and model strategies in response to specific incidents as they crop up as opposed to introducing them systematically according to a plan?

Your response:

10.2 How do we situate strategy training within culture? For example, assume that you are training students who are learning the Spanish they will use in a variety of different Latin American cultures.

Your response:

10.3 Assuming learners differ in their awareness of strategies, how might you make sure to reach all learners? If there were, for example, a learner self-access website for strategy awareness raising, what materials/activities/screening devices/tasks would we want to have there to be sure to reach every learner irrespective of age, gender, language proficiency, motivation, language aptitude, short- and long-term goals, and cultural background?

Your response:

11. With regard to research methods dealing with learner strategies:
11.1 Do you/would you use verbal report in your research and if so how? For example, how explicitly do you/would you train your respondents? How intrusive are you/would you be in the data collection process?

Your response:

11.2 How might you establish a tangible link between the use of a strategy or strategy sequence or strategy cluster and a particular learning outcome?

Your response:

11.3 What are some cost-effective means for follow up to determine the long-term benefits of learner training?

Your response: