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LEARNER STRATEGIES

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INTRODUCTION

The terms "learning strategies" and "learner strategies" are not new to many teachers, yet the concept of strategy is not always clear because of the various ways in which strategies have been studied in research and presented in language teaching materials. A scan of the literature on strategies that learners use will show that there is no one single definition for these things that learners do which are called strategies. Strategies have been described by different scholars as "techniques, tactics, potentially conscious plans, consciously employed operations, learning skills, cognitive abilities, language processing strategies and problem-solving procedures" (Wenden 1987, p.7), as well as "specific actions, behaviors, steps, or techniques that students (often intentionally) use to improve their progress in developing L2 skills" (Oxford, 1992, p.18). One of the reasons for the variations is that different scholars have focused on different aspects of strategies in their writing and research. Thus, rather than offering another definition for strategies in this chapter, I will attempt to clarify this concept by focusing on eight characteristics of learner strategies that are compatible with the view of many strategy experts (Cohen, 2007). This will be followed by suggestions on how teachers can introduce strategy instruction. I will also highlight some issues in strategy instruction and suggest ways in which these may be addressed. Throughout the chapter, I will use the term "learner strategies" to refer to strategies that language learners use to help them in learning a second language as well as communicating in that language.

WHY ARE LEARNER STRATEGIES USEFUL?

Many strategy experts believe that language learners could benefit from using strategies to make up for what they do not know or are as yet unable to perform in the second language. In addition, by using strategies, language learners can achieve their learning potential and become individuals who could learn and use language flexibly and independently. Language

learners use strategies to manage their overall learning of the language, perform tasks related to listening, speaking, reading and writing, solve specific problems during oral communication, learn vocabulary and grammar, and last but not least, make their efforts at learning and using a second language easier, more productive and more enjoyable. Overall, by using strategies, language learners can become more self-regulated in their learning by making decisions about how and when to plan, monitor and evaluate what they learn and the ways they learn. Learners also become more reflective about the way they use language and become more engaged in the process without having to rely constantly on the guidance of their teachers. Some recent studies have also suggested that strategy use can help learners increase their proficiency and performance directly.

CHARACTERISTICS OF LEARNER STRATEGIES

   1) *Strategies are conscious behaviours involving cognitive, social and affective processes.*

Strategies can take the form of covert mental activities that learners use to process and manage the flow of information in a second language. For example, learners can improve their comprehension of what they read or listen by employing strategies such as predicting, making inferences and monitoring their comprehension. Some strategies are overt social behaviours such as when learners ask questions to clarify what they do not understand or request speakers to repeat what they say in order to continue in an interaction. Strategies can also take the form of internal speech to manage negative emotions. For example, when some learners are anxious or feel discouraged, they 'speak' to themselves in order to encourage themselves positively.

   2) *The use of strategies is managed by metacognition.*

Cognitive, social and affective strategies are controlled by a higher level of cognitive processes known as metacognitive processes. These processes enable individuals to manage the way they use strategies through planning, monitoring and evaluation (Brown, 1979). The control and regulation of strategy use often depends on learners' metacognitive knowledge (Flavell 1979, Wenden 1991): knowledge about themselves and others as learners, knowledge about the nature and demand of the task and knowledge and knowledge about strategies that can be used for achieving their goal in language use and learning, be it learning

new vocabulary or grammar items, comprehending what they read or listen to, or expressing meaning through speaking and writing.

3) *The amount of attention learners give to the strategies they employ may vary according to different factors.*

Although the use of strategies requires attention on the part of the learners, not all tasks require the same amount of attention. For example, when they have to solve a comprehension problem while listening to a lecture with very little visual support, learners may have to heed the language input closely and use familiar content words to reconstruct the content of what they hear. On the other hand, if they are talking to someone face-to-face on a familiar topic, such as a movie they saw the night before, they may use the facial expressions of the speaker or their knowledge of the plot to draw quick inferences of words they do not understand.

4) *Strategies may be employed individually or in an interactive and orchestrated manner to form a network of processes for achieving a better communication or learning outcome.*

Language learning and communication are complex activities. When learners encounter problems, they may have to use not one but several strategies to enhance their performance and achieve their goals. This is because different strategies when applied together to a task can interact effectively with one another to achieve a unified learning or communication outcome. For example, when learners draw inferences of the meaning of what they hear in a listening text, they also need to monitor their interpretation by considering clues from the context or from the unfolding text. If they realize that they have made a mistake in their interpretation, they should use another strategy such as wait for repetition or rephrasing of the information and try again. A learner who only uses the strategy of guessing and ignores accompanying cues may miss valuable opportunities for arriving at an accurate or acceptable interpretation.

5) *Some strategies can contribute to language development directly while others may not.*

There are two types of strategies. The first type is used for improving the learning of a second language, such as strategies for remembering and producing new vocabulary items that can help increase learners' proficiency. The second type is used for managing a problem or

enhancing communication during language use. This type of strategies may or may not lead to language development. A communication strategy may help to develop a learner's language further if it requires the learner to draw on their linguistic resources, no matter how limited it may be. For example, a learner may resort to paraphrasing or circumlocution to produce speech that is comprehensible to their listeners when they cannot think of a word in the second language. On the other hand, another learner who experiences a similar problem may decide to use an avoidance strategy, such as using a word in the first language or keeping silent completely. Clearly, this strategy is not going to help their language development.

6) *The quality and the use of strategies by individual learners is influenced by internal and external factors*

Broadly speaking, whether or not learners use strategies or use strategies that are effective depends on three factors: the learners themselves, the tasks they have to complete, and the environment in which learning and use of the second language take place. Research indicates that high proficiency learners use more metacognitive strategies than their low-proficiency counterparts. A possible explanation for this phenomenon is that high-proficiency learners are not hindered by low-level perception or production processes such as word recognition (reading and listening) and word production (speaking and writing). As some of these processes may have become automatised, high-proficiency learners can therefore give more attention to monitoring and evaluating their comprehension. The nature of tasks, for example, reception (listening and reading) vs. production (speaking and writing), can also influence learners in the strategies they select. In cultural contexts where face-saving is important, learners may choose to use certain avoidance strategies so as not to lose face in front of others.

7) *Strategies can be viewed at a macro-level as a general strategic approach to a task and at the micro-level as specific strategies for realizing that approach.*

It is useful to make a distinction between the generality of broad global actions and the specificity of small actions or tactics that help to realize the general strategy. A general strategy can be viewed as a general approach that one takes to achieve a goal while a specific strategy (or tactic) is one of several ways in which that strategic approach can be realized. A general or macro strategy typically consists of a number of relevant specific strategies. Table

1 shows this generality-specificity distinction for the frequently used strategy of inferencing. This distinction of generality and specificity is particularly relevant for strategy instruction as it can help clarify how a strategic approach can be achieved through different techniques depending on the types of task and the context. Research provides some indication that although some strategies are used by both high and low proficiency learners, the high-proficiency ones tended to use a wider range of specific strategies or tactics flexibly to achieve comprehension.

Table 1   Macro and micro-strategies for drawing inferences of unknown words and missing information (adapted from Goh, 2002)

GENERAL STRATEGY	SPECIFIC STRATEGIS (Tactics)
Inferencing	• Use contextual clues to guess the meaning of unknown words. • Use familiar content words to deduce the meaning of what is heard • Draw on knowledge of the world to guess the meaning of what is heard • Apply knowledge about the target language to guess the meaning of unknown words • Use visual clues to fill in meaning unavailable from the text

8) *Knowledge about and use of strategies may be jointly constructed and managed by learners working together.*

The literature on learner strategy typically focuses on the way individual learners use strategies and the effects individual characteristics, such as gender and language proficiency, may be related to the effectiveness of their strategy use. Language learning and language use, however, are not activities that learners engage in on their own exclusively. Thus learners' knowledge about and use of strategies must also be understood in its interactional and sociocultural contexts. For example, training ESL writers to use peer review productively may be seen as a way in which learners jointly construct new metacognitive knowledge about the writing process and jointly develop strategies for improving their language production (Hu, 2005), and getting learners to engage in collaborative dialogue as they experience listening strategy instruction enable them to develop new insights into strategy use that they may not have acquired had they worked on a listening task individually (Cross, 2009). For

example, when learning to apply a particular strategy, learners discuss the problem they have, the usefulness or relevance of the strategy and how they plan to use it.

CLASSIFICATIONS OF LEARNER STRATEGIES

Teachers can instruct language learners on the use of strategies to enhance and facilitate their language learning and communication. To do this systematically and in a principled manner, strategy instruction can be based on one of the following strategy models. Teachers can choose the one which they feel their learners will easily understand and relate to.

O'MALLEY AND CHAMOT (1990)

O'Malley and Chamot (1990) adopted an information-processing theoretical model which contained an operative or cognitive processing function and an executive or metacognitive function. In addition, they included social and affective dimensions to account for the influence of these processes on language learning. These are represented as follows:

- *Cognitive* strategies are mental operations which interact directly with incoming information. They facilitate comprehension and recall, and production. Examples include summarization, translation and inferencing.
- *Metacognitive* strategies are mental operations that manage learning and cope with difficulties. They are used for planning, monitoring, and evaluating learning processes. Examples include selective attention and self-monitoring.
- Social-affective strategies are behaviours that involve others to assist one's learning and communication, and control one's emotions in order to complete a learning task. Examples include asking for repetition and clarification and positive self-talk.

OXFORD (1990)

Oxford's (1990) strategy system comprises two distinct but related groups of strategies:

- *Direct* strategies involve mental operations that process language to help learners store, retrieve and use language in spite of limitations in vocabulary and grammar.

The three main sets of direct strategies are memory strategies, cognitive strategies and compensation strategies. Within each set are more specific strategies and further subsets of these specific strategies, for example, creating mental linkages, analyzing and reasoning, and guessing intelligently.

- *Indirect strategies* "support and manage language learning without (in many instances) directly involving the target language and work in tandem with the direct strategies" (p.135). The three main sets of indirect strategies are metacognitive strategies, affective strategies and social strategies. Just like direct strategies, each set of strategies is further differentiated into more specific strategies, such as arranging and planning your learning, taking your emotional temperature, and asking questions respectively.

The two models share three similar characteristics. Firstly, they acknowledge the importance of metacognition, or thinking about one's thinking. Secondly, they acknowledge the role played by cognitive strategies which directly manipulate input through mental processes such as inferencing and prediction. Thirdly, the models are explicit about social-affective dimensions of learning. By acknowledging the conceptual and social affective bases for language learning, these frameworks are sufficiently comprehensive and therefore useful for preparing activities for strategy instruction.

TEACHING LEARNERS TO USE STRATEGIES

Teachers may notice that some students seem to have very little success with learning a second language even though they are motivated and conscientious. This can be very demoralizing for both student and teacher. The problem could be that the students are working hard, but not working smart. Using one of the strategy classifications as a framework, teachers can help students find out about the quality of their strategy use. Learners who are not using strategies adequately or are using inappropriate ones will benefit from further strategy training. The effectiveness of strategy instruction has been tested in some research studies and the encouraging results have been translated into more permanent teaching frameworks, for example, The Cognitive Academic Language Learning Approach (CALLA) by Chamot and O'Malley (1994).

Chamot, Barnhardt, El-Dinary & Robbins (1999) proposed the Metacognitive Model of Strategic Learning as a framework for their strategy training programme. The model consists of four metacognitive processes – planning, monitoring, evaluation and problem-solving - where various strategies may be used. Learners are encouraged to work through each of these processes for learning tasks that they find challenging. The four processes are said to be not sequential and may be used flexibly to achieve the goals for different tasks.

The following are some popular techniques used for teaching learners about strategies:

a. *Teacher modeling* – Teachers demonstrate the mental, affective and social processes that they engage in when approaching and carrying out a task. They do this by verbalizing these thoughts in a procedure commonly referred to as 'think aloud'. For example, the teacher reads aloud a reading passage and stops at places where there is a 'problem'. He then verbalizes aloud: "Se..ren..di..pity…Not sure what it means. Based on what I know so far, it could mean something nice has happened. OK, I'm just guessing here, but it's OK. It seems to make sense. I'll read on and see if I'm right."

b. *Awareness raising* – Teachers provide various opportunities for learners to think about the strategies they use and how other strategies might also be relevant to their learning and communication goals. This can be done through small group sharing, teacher-lead discussions and learning diaries. Teachers also introduce the names of common and useful strategies. For example, students discuss in groups the topic "What I find most difficult about learning new vocabulary and how I think I can overcome this difficulty". After their discussions, the teacher elicits what the groups have learnt from one another. She then elaborates on one or two strategies that can be used to help with the most common difficulties reported.

c. *Guided practice* – Teachers provide learners with a set of guidelines and activities on how to approach a task by planning which strategies to use, monitoring the use of the strategies and evaluating the effectiveness of the strategies. The practice may be integrated with a language learning task. For example, the teacher asks the class to listen to a self-selected audio recording or watch a video recording. He gives every student a self-directed listening guide in a sheet of printed paper with several guiding questions to work through when selecting and listening/ viewing the recorded text.

d. *Review and Reuse* – Learners are asked to review and evaluate the way they use strategies. They identify those that they have used and those that they think could be useful but have never used. Teachers set new tasks for learners to reuse strategies that learners have found to be useful. For example, at the start of a lesson, students form pairs or groups to reflect on a task, such as the listening task mentioned in (d). In discussing with one another, they learn about new strategies that they may not have used. The teacher sets another similar listening task and asks the students to use the old and new strategies that they reviewed.

e. *Reflect and Refocus* – Teachers invite learners to explain their purpose for using certain strategies. Many learners resort to some form of strategic behaviours to help them when they encounter a problem or when they want to become better at what they are doing. Not all, however, can say what exactly they are trying to achieve with those strategies. Getting learners to reflect on their goals for using strategies will help them to refocus on what they do and why they do it. It is also a time to learn the names for the strategies they have been using.

According to Rubin, Chamot, Harris and Anderson (2007), strategy-based instruction (SBI) should be guided by the following principles:

a. Directly related to problems that learners are seeking to solve.
b. Leads to immediate and recognizable success.
c. Taking cognizance of the cultural diversity and individual differences of learners.
d. Include sufficient scaffolding, modeling, practice and development of self-assessment.
e. Recognize that it takes time for learners to develop their ability to use strategies.

To carry out strategy instruction, special sessions can be planned within normal curriculum time. For example, every fortnight the teacher focuses on developing learners' strategy knowledge and use about one area of language learning or use using one or more of the techniques in the previous section. Using the same techniques, teachers can also integrate strategy instruction with language lessons. For example, in a reading lesson, the teacher guides students in selecting and applying appropriate strategies for engaging with the written text, as well as for managing and evaluating their own comprehension. The teacher models the use of appropriate strategies at different parts of the reading lessons to demonstrate how this is done according to the type of text and the demands of comprehension tasks. Both

explicit instruction and integrated instruction have their benefits and can be used at different times to help learners become more aware of strategies and practice the use of selected ones.

ISSUES IN STRATEGY INSTRUCTION

The value of strategy use and strategy instruction has been frequently acknowledged. Despite this, strategy instruction has not yet become a key part of mainstream pedagogical recommendations and practices in language teaching because it has not had sufficient grounding in the broader field of second language acquisition research (Manchón, 2008). Curriculum writers and teachers often do not see how teaching learners to use strategies can contribute to better language development. Another reason is that strategy instruction may be seen to use up precious curriculum time for language teaching. As McDonough pointed out, strategy instruction is not actually the same as language teaching, so teachers who include strategy instruction often have to demonstrate that time taken away from direct language teaching is made up for by evidence of improvement in learners' proficiency (McDonough & Archibald, 2006). As explicit strategy instruction may create concern for some teachers, Grenfell (2007) recommended for some aspects of it to be integrated as part of a process-oriented approach to language teaching.

CONCLUSION

Strategies help learners take control of their learning process, thereby improving their confidence, motivation and even performance. It is important therefore that teachers and teachers-to-be become acquainted with theoretical and practical perspectives concerning learner strategies. However, there remains a gap in strategy instruction between theory and practice. This has perhaps to do with the fact that much of the research in learner strategies has been undertaken by academics or teachers doing graduate studies. Many teachers are merely passive observers of these developments, not knowing how learner strategies can have an impact on teaching and learning. One way of strengthening the nexus is for more researchers to work directly with teachers to implement intervention projects. Another way is for teachers themselves to undertake action research projects and share expertise and results within their communities of practice. In so doing, practitioners can better understand the

concept of learner strategy and develop new techniques for strategy instruction that are contextually and culturally effective for their learners.

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