2019

EXTRA: A Festschrift in Honor of James R. King

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EXTRA:
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Edited by Lindsay Persohn and Aimee Frier
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Introduction

Jim began his career in Higher Education in Morgantown, WV at West Virginia University. He received a Claude Worthington Benedum Fellowship for doctoral studies to pursue research in the Reading Program in the College of Education and Human Resources. During his tenure at WVU, he engaged in a variety of coursework that centered on early literacy, child language development and theoretical linguistics.

After graduating, he took an Assistant Professor position at the University of Pittsburgh, where he continued to study cognitive theories of language and linguistics, as related to Literacy in the Department of Language Communications at Pitt. During his three year tenure at Pitt, a major line of research was the impact of questioning on comprehension of texts, as well as the role summarization plays in studying for essay examinations. These lines of research were published in the Journal of Reading Behavior (now Journal of Literacy Research). The focus on cognitive theory in literacy was burgeoning at the time. Also, during this time at Pitt, Jim began a commitment to teacher development in the Pittsburgh area school districts. He provided training in workshop approaches to writing development, based on the New Hampshire model (notably Don Murray, Donald Graves, and Lucy Calkins).

Following his time at University of Pittsburgh, Jim took an Assistant Professor position at Texas Woman’s University. TWU is unique haven for scholarship based on decidedly feminist orientations. In the seven years he was an Assistant Professor and then Associate Professor at TWU, he was able to return to comprehensive inquiry in early and emergent literacies, as this area was a TWU specialty in a combined PhD in Early Childhood Education and Emergent Literacy. In his role as a Literacy Professor at TWU, he joined a consortium that offered a joint PhD in Literacy. North Texas State (now University of North Texas) and East Texas State (now Texas A&M Commerce) and TWU formed a three-way partnership in literacy studies, called the Federation of North Texas Universities. He was able to work with colleagues at three different universities. Pooling their resources, they were able to convene significant faculty self-development projects (a week with Shirley Brice Heath, a week with David Bleich, author studies with Jane Yolen, etc.). In his final year at TWU, he took an in-house sabbatical to be trained as a Teacher Leader in Reading Recovery. The RR training involved an academic year of 18 credit hours of advanced graduate coursework, weekly all-day training and daily
work with at-risk first graders at a Richardson, TX (Dallas suburb) elementary school. He also continued his research in cognitive processes in more mature literacy in the area of Discourse Synthesis. With Dr. Nancy Spivey (now Nelson), he completed several studies, received a joint Elva Knight grant from IRA (now ILA), resulting in a significant publication in Reading Research Quarterly, arguably the most prestigious journal in the field of Literacy Studies. The article, “Readers and writers composing from sources: The role of discourse synthesis” was subsequently re-published in the fourth edition of Theoretical Models and Processes in Reading. He continued his teacher development strand in workshop approaches to composition instruction.

In August of 1990, Jim accepted a position as an Associate Professor at the University of South Florida. Shortly after joining USF’s Reading faculty, Dr. Susan Homan and Jim (with Barbara Frye, USF Saint Petersburg) started a program similar to Reading Recovery, called Accelerated Literacy Learning (ALL). They utilized Marie Clay’s published training materials, Jim’s expertise as a trainer, and started on a 10-year path. Over the decade, they brought early literacy intervention to 13 Florida counties, over 40 teacher leaders, over 400 teachers, and over 20,000 first graders. Their work in ALL and its dissemination was supported by a $400,000 grant from the Verizon Foundation. This work is something Jim is rightfully very proud of! In addition, Jim and Dr. Homan were consultants for three years in Broward County, Florida, where they saturated the 147 elementary schools with at least one ALL-trained teacher, and trained six district Teacher Leaders to manage the Broward ALL. “No Child Left Behind” legislation levied financial conditions on how districts spent school resources which meant the days for ALL were numbered. Now when he meets ALL-trained teachers, they agree it was the best teacher literacy in service, ever! In fact, ALL training did impart teachers with deep knowledge of the cognitive linguistic processes that underlie early and emergent literacies. More importantly, ALL facilitated teachers’ productive use of teaching language that prompted students’ acceleration in literacy development. There are rustlings and rumors that RR will make its way back to the Tampa Bay area. Jim doesn’t think it can happen soon enough.

Another area that Jim brought with him to USF was a deep commitment to Feminist Theory and how these understandings are embedded in educative processes. Feminism led him to coming out and his productive use of Queer Theory. He taught from this perspective for some time and eventually published writing in Qualitative Studies in Education, Theory into Practice, and Taboo: The Journal of Culture and Education, as well as several book chapters related
to teachers’ sexual orientations and the potential problematics in their teaching. Finally, the work he did in gender and teacher led to the book: *Uncommon Caring: Learning from Men who Teach Young Children* (King, 1999).

Another of Jim’s long-term interest area is in the history of literacy instruction and oral history as an educational practice. Most of this work has been completed with his long-standing colleague and friend, Dr. Norman Stahl, Emeritus, Northern Illinois University. Currently they co-chair the History of Reading Study Group for the Literacy Research Association. This continues as a labor of love, but one for which they are grooming a successor. In this related body of work, Norm and Jim have appealed to teachers to conduct and to teach the use of oral history as an act of curriculum. With a rationale and a how-to article, they successfully blanketed the state reading journals that were operational at the time. They have also attempted to register oral history practice and its ethical aspects in research journals (*Narrative, Qualitative Inquiry, Qualitative Studies in Education, Reading Teacher Educator*). Both Dr. Stahl and Jim have a strong commitment to establishing a continuing strand of research in historical approaches to understanding reading instruction (*Reading Psychology*).

During recent years at USF, Jim has returned to linguistic theory in two ways. First, he designed and currently teaches a course in the history of western linguistics and its influence on practices in literacy education. Another venue for linguistic inquiry has been in the area of text analysis and linguistic analysis of text in bilingual education. From this work, he has authored publications in *Linguistics in Education*, and several more book chapters.

Currently, Jim is involved in a large-scale study of text use in Chicago area Community Colleges. Developmental Reading courses are supposed to ready underprepared students to use texts in subsequent coursework. One stream of coursework, Career and Technical Education, is currently being pushed by the Federal Department of Education as a way to meet workplace needs for literate workforce. Early findings suggest a lack of alignment between developmental and career use of text in these course that are supposed to get students ready for text use within courses of study. Several iterations of the study for different audiences are being prepared. The omnibus study from which these iterations will emerge is published as *Literacy in the ‘In-Between Spaces’ of Community Colleges: Interstitial Practices in Developmental Reading and Career Technical Education*. 
References


Dedication

Thank God for Dr. King!
Jenifer Jasinski Schneider

In 2004, Jim and I decided to collaborate on a teaching/research project in which we combined his reading course with my writing methods course to create an embedded field experience for pre-service teachers. Part of the requirement for both courses was the tutelage of the 50 elementary children who came to the at the University Area Community Center for a summer school program. The children and preservice teachers worked together to create productions of multi-genre projects (Allen & Swistak, 2004) in the form of the evening news.

The children read multiple texts, conducted research, wrote news stories, created art projects, and presented their stories for the camera. The preservice teachers assessed students’ reading and writing abilities, identified appropriate texts, used shared, guided, and modeled strategies to help students read and write across genres, and used iMovie to create newscasts.
Using an overly complicated structure of partners, teams, and cross-course communication, we received a small grant and invited several doctoral students to study the impact of teaching “new” literacies in teacher education contexts.

Jim led the students in learning about emergent literacy, predictable texts, repeated reading, big books, and all associated instructional strategies for teaching reading.

I led the students in learning about writing assessment, text structures, and strategies for teaching writing through the creation of a digital magazine for children.
Jim and I also worked with four doctoral students (Deborah Kozdras, Mary Virginia Feger, Vanessa Minick, Antoinette Kirby) who served as voluntary research assistants on this project. Our initial explorations were first shared at the National Reading Conference (e.g., Schneider, King, Feger, Minick, Kozdras, & Kirby, 2005) and we consistently presented our work-in-progress at other national and international conferences (e.g., Schneider, King, Kozdras, & Minick, 2006).

After two summers, we evaluated the project and decided to move to a school-based experience in which we had a consistent group of children and the support of classroom teachers. Jim and I, along with two doctoral students
(Deborah Kozdras and Vanessa Minick), brought our road show to a Catholic school that gave our preservice teachers the opportunity to work with four grade levels of children and eight classroom teachers.

James Welsh (doctoral student) joined our project, providing support throughout the whole project while lending his expertise in technology.

Our preservice teachers worked with beginning readers and writers to help develop the students’ knowledge of print, reading fluency, and text comprehension as the Kindergarten students used iPods to retell their favorite school memories. First and second graders created digital story books and our the USF teachers administered different assessments to determine their reading levels.
We also worked with 6th grade students to engage in an oral history project in which they examined written documents and conducted interviews with faculty and alumni. The older students wrote reports, podcasts, and videos to present their research.

Our USF students worked with children in K, 1, 2, and 6 grades, gaining a sense of how children learn to read and write across grade levels.

Although the work was laborious and required excessive planning and lugging of computers, cords, and cameras to field sites (this was well before schools
were equipped with technology) an unexpected bonus was the repeated opportunity to watch Jim teach children—

and to watch Jim teach teachers how to teach children.

Jim carefully and strategically observed preservice teachers’ attempts to enact unfamiliar instructional practices. And when needed, or upon request, he carefully entered into the teaching space to show the apprenticing teachers how to teach while also providing their students with expert instruction.

I learned so much from watching Jim teach children and their teachers. I witnessed the ways in which he guided the teachers with gentle questions; how he knew exactly when to intervene just by watching and listening for brief moments; how he wielded tremendous expertise with a very careful approach that protected the fragile and developing egos of the practicing teachers; how he showed them exactly what to do and exactly what to say to support learning. I watched him build rapport with the children, their parents, the cooperating teachers, and the administration.

Although we shared the structural model of this field experience, we independently and collaboratively explored our personal interests in oral history, identity construction, text analysis, and composing while working together to understand “new” literacies. We also experimented with different forms of arts-based inquiry as we wrote and published our emerging theories and tentative interpretations (e.g., Schneider, King, Kozdras, Minick, 2011).
Our learning was quick and elusive. Our theories and interpretations fluctuated with every new invention by Apple (iPod, iPad, iBooks). A quick review of our conference paper titles from 2006 to 2011 reveals our evolution. In our earliest collaborations, we used the term “multi-literacies” (e.g., Schneider, King, Kozdras, & Minick, 2006). But the speed with which our learning occurred propelled us to develop the idea of “fast-literacies” (e.g., King, Schneider, Kozdras, Welsh & Minick, 2009). We settled on “multimedia” or “media literacy” for a time, but eventually we used more narrow descriptors to describe students’ products such as digital storytelling, movie making, and multimedia texts. We consistently presented our emerging findings and tentative understanding at national and international conferences.

Given the advanced levels of technology available to us in the College of Education, we quickly gained a reputation for cutting-edge technology integration and innovative programming. Our doctoral students were recognized for their innovative scholarship (e.g., Deborah Kozdras received a Spencer Dissertation Fellowship; James Welsh developed the TIM tools for the Florida Center for Instructional Technology http://fcit.usf.edu/matrix/index.php).

Eventually, we formed a study group, the Contemporary Literacies Collaborative (CLC), to systematically combine our examinations of digital tools and to explore the impact of technology on literacy development and instruction.
We conducted research in summer movie camps (e.g., Welsh, Kozdras, King & Schneider, 2009), after school programs (e.g., King, Schneider, Kozdras & Welsh, 2008), and community centers (e.g., Schneider, King, Kozdras, Welsh, & Minick, 2009). We also created a website to describe our projects and publish tech reports (See http://fcit.usf.edu/clc/index.php)

As a result of our design-based research, we narrowed our focus to study multimedia, multimodal composing across iterations of my undergraduate writing methods course. We also came to rely on a 6-week campus-based field experiences with Learning Gate School (an environmentally-focused, public charter school) during the regular academic year, and a week-long alternative calendar course for the summer.
With a singular focus on writing methods, I taught the class while Jim served in a research role.

Jim, transformed his role from co-instructor to full-time researcher easily, attending each session and taking copious notes, watching students and teachers as they learned together.
Yet, he couldn’t help himself—as he observed the groups, he found himself in the role of teacher and mentor.
During one particular summer, I taught a challenging group of 35 teacher candidates who I partnered with 79 5th grade students. I experienced a great deal of trouble with the laptops and the cameras. We used old laptops with very little memory and this caused a great deal of trouble—especially with video files. I had to deal with excessive computer crashes and problems that did not exist in previous iterations.

Jim served in a research role during in this iteration; but I was unaware of how the students perceived him until I read the course evaluations. One student wrote, “This class was a serious challenge. I don’t know how we met the deadlines and made it through with final products. Thank God for Dr. King! I would never have made it without him.”

I agree!
References


Section One: Ideas Inspired by James R. King
Choosing Our Words to Open Minds: The Role of Teacher in the Dialogic Classroom

by

Danielle Dennis, Sherridon Sweeney, and Sarah Hart

Danielle was a colleague of Jim’s at the University of South Florida. Jim served as Sherridon’s literacy professor during her doctoral studies at the University of South Florida.
Abstract

Classroom discourse plays a mediating role in what counts as learning in the classroom, and the ways in which discourse is enacted are closely tied with the type of curriculum in place (Applebee, 1996). Student-centered structures lead to knowledge gained that is both contextualized and productive (Applebee, 1996), and the instructional language used within these structures is focused on the teacher and students co-constructing understandings in social ways (Wells, 2003). The purpose of this paper is to describe the findings from a formative experiment that questioned teachers’ instructional language, and shared classroom discourse, as they developed dialogic classrooms guided by a dynamic frame (Johnston, 2012).

Keywords: teacher language, dialogic, classroom discourse
Introduction and Theoretical Framework

In this study, we approached our work through the lens of dialogic inquiry (Wells, 2003), which offers that, “…the very same conversations that provide the opportunity for the child to learn language also provide the opportunity to learn through language” (p. 51). Thus, it is through dialogue that we develop epistemological stances of the classroom specifically, but of the world more broadly.

Language can represent either a fixed or dynamic frame (Johnston, 2012). In a fixed frame, ability is viewed as something permanent and therefore unchanging. Whereas, in a dynamic frame, ability is viewed as “…something that grows with learning and depends on the situation” (p. 11). In a dynamic frame, a teacher’s language factors in children’s Zones of Proximal Development (ZPD) (Vygotsky, 1978) by being responsive to their abilities, and having the depth of knowledge to guide them further in their development. Language, then, serves as a mediator of development (Wells, 2003), and teachers’ purposeful selection of language during instruction becomes a tool for learning because it presumes a shared meaning making with children (Johnston, 2012; Vygotsky, 1978; Wells, 2003).

Method

Reinking and Bradley (2008) offer that formative experiments are heavily grounded in theory, but in ways that are different from more traditional educational research methodologies. In formative experiments, researchers put theory in “harm’s
“way” (Reinking & Bradley, p. 18) to determine the usefulness of the theory in practice. Formative experiments allow researchers to approach the question “What could be?” and merge research and practice to produce more transparent findings. Guided by systematic data collection and analysis, the goal of formative experiments is to “bring about positive change in education environments through creative, innovative, instructional interventions grounded in theory” (Reinking & Bradley, p. 6). When conducting formative experiments, researchers ask questions that are investigated in real educational settings, leaving the context only minimally constrained by the research. Although generally positioned as a “valued informant,” the teachers engaged in this formative experiment worked side-by-side with a university researcher as members of the research team. Unlike action research, however, Reinking and Bradley argue that theory development is the purpose of entering into the iterative formative experiment approach to studying educational practices. Thus, researchers “acquire data that produce rich explanatory descriptions that link interdependent variables in an authentic educational context to pedagogical outcomes in ways that inform theories” (Reinking & Bradley, p. 46).

Following the identification of the theory previously discussed, we designed an instance of the theory (Phase I) that occurred within a real educational setting (Anderson & Shattuck, 2012). We collected and analyzed formative data on the instance, and from these analyses, revised the instance (Phase II). Because formative
experiments are iterative, we repeated the data collection and analysis cycle (Phase III), and will continue to do so until we revise, or develop, a theory that informs the field. In this presentation, we will discuss the context, methods, and findings for Phase I, II, and III of our work. We used Hatch’s (2002) method of inductively and deductively analyzing data to determine themes that emerged from the data (inductive), as well as to look for evidence of the theoretical framework within the data (deductive).

Data Sources

Context and Participants. The research took place at a public, urban elementary (K-5) school in a large Southeastern city. The school is situated on the campus of a large university, and is one of six elementary partnership schools. The school’s population is 89% economically disadvantaged, 41% Black, 28% Hispanic, 14% White, and 9% Multi-racial. Additionally, 21% of the students are in special education programs, and 22% are English Language Learners. The schools’ mobility rate is 13%.

Two teachers participated in this research. One is a second grade teacher in her fifth year of teaching, and the other is a third grade teacher in her sixth year of teaching. Both work closely with the partnership as collaborating teachers, and both are enrolled in the university’s Master of the Arts in Reading program. The teachers
participated in the data collection, transcription, and analysis, with support from a research faculty member.

**Data Sources and Phases**

Phase I data included a single video of literacy instruction from each of the teacher researchers’ literacy instruction. We used this video as baseline data for the type(s) of language employed in their literacy classrooms. These data were analyzed using Hatch’s (2002) inductive analysis to iteratively code salient domains, and locating both examples and non-examples of the domains in the data in order to construct participant narratives. The analysis prompted the teachers to ask questions about the nature of their classroom instruction, which they noted was more teacher-centered than they imagined it to be. This prompted them to inquire about ways in which their classroom literacy instruction may become more dialogic in nature.

Phase II data included three videos of literacy instruction as the teachers thoughtfully and explicitly applied principles of a dialogic classroom. Additionally, the teachers maintained researcher journals in between video taped instructional sessions that documented their use of Johnston’s dynamic frame language, and student use and/or responses to instruction. Once again employing Hatch’s (2002) inductive analysis, this phase prompted them to consider the components of the dynamic frame upon which they wished to focus (praise and inquiry).
Phase III data included six videos of literacy instruction and the researchers’ journals. Transcripts of the videos were coded by inductively and deductively (Hatch, 2002), using Johnston’s dynamic frame for praise and inquiry.

**Results**

Five findings were evident through the analysis of Phase I-III data. Within this section, we explore each of these findings.

**Finding 1: Time**

Time is an essential component to this work. Co-constructing meaning with children through language requires teachers to be thoughtful about their language-in-action. Language becomes a source of dynamic development for teachers, and that development requires time for analysis and implementation.

Both teachers found evidence in the transcripts of vacillating between a fixed and dynamic frame, despite focusing their instruction and research on shifting toward a more dynamic approach to instruction. The dialogue below is from the fourth video in Phase III, which was recorded six months into the phase.

T: Yes they’re neighbors. *I like* how you called them neighbors, that is *so much better* than friends. *I like* that.

This evidence of a fixed frame indicates to students that they respond in order to please the teacher, rather than for the authentic purpose of using dialogue to negotiate and comprehend text (Johnston, 2012).
The teachers also commented that they found themselves “rushing in” on a moment in a conversation and taking over, or not providing enough wait time.

T: What else might that man be thinking in that picture? What might the illustrator be trying to convey or get across to you through the picture?

S: That, that he, he’s happy that she, he might be happy because his daughter sent him something [takes think time]

T: Okay…

S: …that they care

T: Feelings of happiness that his daughter cares. Okay, I’m gonna read this section now, ready?

However, the teachers note a transition in their approach toward a dynamic frame in their research journal. One teacher comments,

I notice a difference in my language and being an active participant from video 3 to video 5. In video 3, I was removing myself and the student discussions were messy and confusing. By video 5, the discussions are running a bit smoother because I’m participating but in a way that acknowledges my students as “givers of knowledge” and not just the teacher.

**Finding 2: Using But Confusing**

In relation to providing the time to develop thoughtful consideration of language use, we found instances of the teachers using but confusing the language
on which they were focused. For example, when attuned to Johnston’s (2012) process versus person feedback, the teachers noted awkward pauses in their instructional language as they searched for dynamic frame language. In doing so, they often used language of the dynamic frame, but not language that addressed the students’ responses directly. Once they read their transcripts, however, they were able to identify instances of using but confusing, and reconsider their language-in-use in the future. This process supported their development as dialogic teachers in a student-centered classroom.

T: [Student name], could I ask you to re-read that page to me please? Using punctuation and expression?

[Student reads the page]

T: Wow, okay so when you read that part where Androcles is saying take it easy and get some rest, I could really hear your expression there, you were, you were changing your voice to make it sound like those words were being spoken. So thank you for practicing your expression there. Ok.

In this example, the teacher is attempting to use “thank you” as praise instead of “good job.” But, because her attention was focused on her praise language, she missed an opportunity to provide the student with critical, explicit feedback on his reading. She struggled to offer the student direction for development, and was vague when focusing on the student’s accomplishment of using expression. In her researcher
journal, she comments, “This was only the beginning...By video 5, I was only saying “thank you” to avoid “good job” and not providing any direction or critical feedback.”

**Finding 3 Teacher Role**

Student-centered classrooms aren’t about less of the teacher. They’re about when the teacher is talking. As the teachers were developing their dynamic frame language, they began by attempting to remove themselves from the conversation. They soon recognized, however, that the goal was not for them to no longer be a participant in classroom discussions, but for them to be an equitable participant. A teacher comments,

> In January, I was still under the subconscious impression that one element of a dialogic classroom was a near-invisible teacher. As my research progressed, I grew to understand that a dialogic classroom features a teacher who has the skill and knowledge base to introduce and then facilitate dialogue between children.

The following excerpt from a transcript is evidence of her shift toward being a moderator in the classroom conversation, rather than the center of conversation with students.

T: [S1] can you see, find somebody who can add to your—or maybe, help you with your wondering?
S1: [S2]?

S2: Umm, he did it for Edward’s own good.

T: Did you hear what he said S1? [S1 nods yes]. What did [S2] say?

S1: He said, he, he picked option number two for his own good.

T: What does that mean to you? Does that answer your question?

S1: Ummmm...

T: Because if there’s confusion still we should have a conversation about your confusion [wait time...] Yeah it does? It did? [S1 nods]. How does it answer your question?

S1: Because...um...because maybe because...he...he just had to because...maybe he, his dad was gonna break him and smash him and stuff.

T: What do you also know that Bryce doesn’t have a lot of?

S1: He doesn’t have a lot of money.

T: So if he’d taken him somewhere else, what do you think might have happened?

S1: He could’ve been like maybe...he could have been with his dad...maybe. Or, if he’s friends with his dad.

T: You think Bryce is trying to keep Edward away from his dad? [S1 nods yes] T: Ohhhkay gotcha. Thank you.

**Finding 4 Student Shifts**
When given time to develop as a dialogic, student-centered classroom, students begin to value each other’s thoughts enough to question them.

T: Did you hear [S1]’s idea?... What do you think about that idea? [S2]?

S2: [looks at S1] I want to add to your thinking [S1] [S1 turns to face S2]...um, he, he’s also probably happy because, um, his daughter send that picture to him and he probably thinking that um, “I’m so proud of her” and everything like that and he might also thinking they’re safe and sound.

S1: [S2], I agree, because, um, because, cuz they, they, she maybe he knows that um, she ‘s, she’s, she’s him, so, so she, I think he misses the girl too, because um, because they, they, she maybe be missing, so, I’m gonna go back so I can read to you, um, the other thing is, when she was talking, when they was talking about it, they, they, he want to know if anything happen because I, I was going to [S3] [S1 turns to face S3]—[S3], remember [S3] said that they might blow up the world? [referencing an earlier comment] I agree with you because um, cuz maybe what I was, uh, an army person, like that army, the other that was fighting them, maybe they will take over our world and maybe they could blow it up.

S4: [facing S1] [S1], um, I don’t think that you, um, I think you mean, like, not “blow up the world”, I think you meant—

S1: Like blow up the city

S5: I don’t understand…
S1: Like part of it.

S4: Like you mean like, you make it, they make it go on fire?

S1: Yea kinda like that but like, like something like, like, the part, the part, like...you know how we’re in Tampa?

S4: Mhmm

S1: Maybe...

This transcript contains an excerpt where the conversation bounced between five students without the teacher intervening or calling on hands. The teacher comments about this interaction, “What I loved about this moment was that two of my ELL students fully joined the conversation and felt comfortable sharing opinions and confusion.” In other words, the teacher witnessed that the shift in classroom discourse from her to the students invited all students to participate fully. Both teachers indicated that students were supporting each other when confusion arose, even when the teacher was not present in the conversation.

First thing this morning, when Ty was [buddy] reading with Dana, she muttered her way through a word she couldn’t decode and I heard him say, “Wait, I couldn’t understand you on this word; can you say it again?” When she successfully decoded it after going back and using a strategy, he said, “Yep! That’s it.”
Because students were beginning to engage each other in accountable dialogue, without the teacher facilitating, they were experiencing success in a situation where they otherwise might have skipped over the opportunity.

**Finding 5: Disequilibrium**

As their classrooms shifted to dialogic, student-centered classrooms, the teachers noted multiple instances of disequilibrium between their dynamic frame and the mandates and expectations of the school district. Questions emerged about instances of power in relation to behavior management systems, and questions of professional capital in teacher evaluation systems. In the excerpt from the teacher’s research journal, she questions how the district’s behavior management plan (a clip chart with clips for individual children that are moved to represent their behavior that day) fit into a student-centered, dialogic classroom.

I had a student today physically pull his hair in frustration and begin to sob because at the end of the day he did not make it to purple (top student) but only to pink (role model). This makes me wonder how effective this behavior chart is and what it is REALLY enforcing? Typically, when a student isn’t following directions or participating, they would move their clip down. How does that help turn the situation around? It doesn’t. The clip chart only frustrates the students more. In this situation, the student was upset that they didn’t get to move their clip up from the prior activity so he came to the
[reading] group upset. So what is the teacher to do? Ask him to move his clip down for throwing a fit in his small group? Here is where the disequilibrium occurs. So, instead of focusing on the clip chart I tried to focus his attention on how he is making the rest of his peers feel at the table. I draw upon the language I can use to pull him into the lesson and activity. This clip chart completely threw him off. So now what? What am I supposed to do with this clip chart? The school district expects to see class expectations in place, parents expect to see a daily or weekly behavior report, and students expect to see consequences for their actions whether positive or negative.

In addition, although not evident enough to be a separate theme, instances of children taking a critical stance toward inequities in education appeared in the teachers’ research journals.

Discussion

Teachers impact children every day through their language of instruction, and this language is tied to a theoretical stance that adopts either a fixed or dynamic frame. Placing importance on educator language development, through practice-based research, allows us to explore the impact and orientation of instructional language, and the e/affect our choices have on children’s development.
References


Kids make movies: Investigating media literacies in action through rhizomatic and memetic analyses

By

Deborah Kozdras, James Welsh, James R. King, and Jenifer Jasinski Schneider

Deb and James were Jim’s doctoral students and colleagues, and Jenifer was his colleague at the University of South Florida.
USF Contemporary Literacies Collaborative

The Contemporary Literacies Collaborative (CLC) in the USF College of Education is a study group that originated when Jim King and Jenifer Schneider decided to co-teach their literacy classes at the University Area Community Center in the summer of 2004. This experiment led to 10 years of collaborative teaching and research to investigate digital literacies and multimedia practices. Across each iteration, they involved many doctoral students, including Deborah Kozdras and James Welsh, who helped them form the CLC. The CLC studies the many ways in which technological changes affect literate practices. Our work focuses on new literacies, literacy in new contexts, identity formation, power structures, and the changing set of skills that empower people to communicate. We have a particular interest in how these contemporary literacies can be brought back into the classroom to engage students and to prepare them for happy, productive, literate lives. This paper, first presented at AERA in 2008, highlights our early and evolving thinking about analysis.

Abstract

The purpose of this paper is to describe the literate identities students enacted in the context of a filmmaking community, and how these identities impacted the digital video composition process. In the larger ethnographic study from which we extracted data for this analysis, we mapped the multiple identities that students assumed (roles), and the different texts that they generated both in and out of roles. As students performed in video productions as actors, scriptwriters, directors, stage managers, they simultaneously engaged in a number of social practices, as well as performed in literacy events (Leander & Wells-Rowe, 2006). These performances may manifest as play (engagement), and as performance (i.e. dramatic presentations, responses to texts, project presentations, digital video creation). Furthermore, when students performed, they also engaged with a variety of identities (presenter of the work; creator behind the presentation; object constructed within the work presented). Out of role, the same students engaged in meta-communicative interactions about their performances, about their scripts, and about their projected final products. In essence, students made new meaning through their play and performance with and through these identities, the socio-cultural practices of the Discourse community, and the evolving literate practices.
Kids make movies: Investigating media literacies in action through rhizomatic and memetic analyses.

Recent research in digital composition has focused on issues of identity (deBlock, Buckingham, Holzwarth, & Niestyo, 2004; Goodman, 2003; Hull & Katz, 2006; Maier & Fisher, 2006). Studies have shown that through video production, students have been able to both explore their “emotional investments” in media, as well as their identity formations as they used a variety of multimodal texts and multimedia tools in order to negotiate those identities (i.e. deBlock, Buckingham, Holzwarth, & Niestyo, 2004). In a recent study, Maier & Fisher (2006) studied the use of digital video tools where low-level readers and writers role-played and made decisions in social, persona, and health education in middle school.

Other researchers have found similar, positive identity effects when youth used digital video. For example, in a comparative case study, Hull and Katz (2006) reported how two students enacted their identities for others through the use of digital storytelling. The older student, Randy, crafted himself as writer, a videographer, a poet, and a musician, all under the collective identity of “artist.” Randy’s multiple identities caused Hull and Katz to recognize “intense awareness of the opportunity to enact [his] identity to self and others…” (p. 54). The younger student, Dara, repositioned herself in relation to school, to family, and to her friends. By merging
her subjectivity with a character, Sailor Moon, Dara appropriated another’s narrative to boost her own agentive sense of self. In both of these cases students used digital storytelling (Lambert, 2002) to “articulate pivotal moments in their lives and reflect on life trajectories” (p. 43). In Hull and Katz’s comparison, difference is not so much a function of age, per se, but of ability and perhaps genre knowledge. When ability difference is construed as a different capacity for filling identity positions or problem solving, it suggests a decalage that is implied in the Hull and Katz study. Hull and Katz discussed how the enactments of identity boosted students’ agentive senses of self-identity. Yet much was left to learn about the various social identities these students assumed during their product creation.

Other recent studies have described the multiple identities/positions available in digital video filmmaking discourse communities. For example, Goodman related instances where students “acted” as professionals while they created documentaries (Goodman, 2003). Goodman found that while students worked on their videos, they took on multiple roles, such as interviewer, writer, and narrator. Goodman’s paradoxical finding was that though the students acted as professionals in these filmmaking contexts, their enactments were created by children, and therefore different in their approaches and complexities to role than from older enactments of the same roles. More succinctly, although they acted as professionals, they still were children. As Goodman explained, the process “challenged them to struggle with new
skills, ideas, and ways of knowing themselves and each other...they grew intellectually and emotionally through that struggle, although they each found different entry points into the project and took different paths of learning.” (p. 96-97).

The acquisition of stable role structure is a process, beginning with the appropriation of objects, habits, gestures, and language of those seen as insiders. Ownership is ultimately conferred by insiders with Discourse authority. In suggesting students’ various entry points, Goodman’s study obliquely addresses the multiplicity of project based student interactions, the multiple identities deployed by each student, and the affects these enacted Discourses created within the digital video composition process and product. This is the complexity we hope to address more directly. In the current study, we look more directly at the multiple “positions” or roles available in a filmmaking Discourse community. What happens when students fill those roles and take on new identities?

Identity and Sociocultural Theories

Identity

From a traditional perspective of social psychology, identity “is often associated with a stable, internal state of being” (Lewis, Enciso, & Moje, 2007, p. 4). Alternatively, from a sociocultural perspective, identity is a more “fluid, socially and linguistically mediated construct” that considers the different positions individuals enact and perform. Similarly, Lave (1996) and Gee (2001; 2002) have
conceptualized learning as shifts in identity; one takes on new identities with new forms of knowledge. Viewing learning as identity shifting can have profound effects on teachers’ deployment of learning activity and students’ uptake of the opportunity structures that result. Within a filmmaking community, as individuals inhabit different positions, they may also take on new knowledge in order to form new literate identities. These literate identities are further enhanced as students become more proficient with repetition, and influence both the processes and products of digital video composition. Yet, the framing of literacy learning as identity work requires elaboration.

*Identity as Identification.* Stevens, O’Connor, & Garrison (2005) also view identity as a fluid construct, as their participants enacted different positions or identities within particular settings. They define identity as “both one’s self-understandings about and actual ways in which one is positioned—both by others and by institutional representations—within some social world. Identity is something experienced (as in “I belong”) but also something bestowed and maintained by others (as in “to us, you belong”)” (p. 2). From our perspective, Stevens, et al. reference what may understood as externalized self-identity work. The individual appropriates language and literacy practices that are valued as insider practice for the group they seek to join. Likewise, “fitting in” is accomplished, at least in part, when confirmation comes from members who are valued as insiders. These
economies of authority trade in age, knowledge, and respect, and membership must be conferred. Stephens, et al. grouped these two related processes as identification. These practices are traceable as “practices of identification” (Becker & Carper, 1956). For example, in a filmmaking community, students may self-identify as filmmakers, directors, actors, scriptwriters, editors, or a variety of other literate identities.

Identities as Social

In cultural studies, Barker (2003) has investigated the difference between self-identity as “the verbal conceptions we hold about ourselves and our emotional identification with those self-descriptions” and social identity as “the expectations and opinions that others have of us” (p. 220). Barker thinks identity is developed through social and cultural context. “The resources we are able to bring to an identity project are historically and culturally distinct. They depend on the situational power from which we derive our cultural competencies within specific cultural contexts” (p. 222). Furthermore, Giddens and Held (1982) noted that social identities “are associated with normative rights, obligations, and sanctions” and within specific groups, these identities “form roles.” In summary, Barker (2003) noted that identity is about “sameness and differences” and “about the personal and the social” (p. 23). In other words, social identity becomes “what you have in common with some people and
what differentiates you from others” (Weeks, 1990, p. 89). Yet, in application identity is deployed as successive differences, or a multiplicity of these differentiations.

Identities as Multiple Discourses

When students engage with multiple identities, they may begin to see some of these acquired roles as projections. In a discussion of social class and literacy, Gee (2002) calls the collection of these roles “identity kits.” He makes the point that the more identities that a student controls, the greater their social power. These identities are enacted through language (discourse) and activities. Gee (1996; 1999) discusses “big D” Discourses as including language with “non language ‘stuff’ to enact specific identities and activities” (p. 7). Analogous to a social identity, individuals enact Discourses when they “pull off being a culturally specific sort of person” (p. 7).

Within a filmmaking community, one must enact a specific set of practices to be seen as a literate member of the Discourse community. For example, someone who possesses popular culture knowledge and can list movie shots and characters would be seen as literate. Additionally, one who acts well and creates clever dialogue would be seen as possessing a valuable literacy for the Discourse community, or again, as literate. Because a filmmaking community requires such a wide variety of positions to be filled, students have the opportunity to develop and enact many social identities. Additionally, individuals may bring in Discourses with which they are literate in everyday life (computer skills, acting abilities, video-camera skills, writing
skills). In these cases, individuals may adapt these Discourses as literate social identities to fill positions within a filmmaking community.

As new literacies are instantiated, the scope of “what counts” in schools’ versions of literacy is also under expansion. The increase in school literacy practices is also shifting to include the personal, the performed, and the popular in a multiliteracies approach to what was once traditional forms of reading and writing. In that regard, we view literacy learning as social practice (Street, 2007). Within a sociocultural perspective on literacy (c.f. Lewis, Enciso, & Moje, 2007), we examined the variety of literate identities students enacted within a specific cultural community and how these identities both served and changed the learning activities. Within sociocultural perspectives we think it necessary to define the cultural influences as well as the social practices that define, are defined by, and redefine the cultures from which they emerged. First, we examine how culture and identity interact in this particular context (a moviemaking camp). Then we examine how identity and learning relate within these cultural practices.

Research Questions

In this study, following recommendations of Leander and Wells-Rowe (2006) we spatialized the concept of identity by mapping the multiple roles students performed throughout the composition process. We asked the following question:
• What roles or social identities do students take on in a filmmaking discourse community and how do these roles affect the processes and products?

Methods

This study is part of a larger ethnographic research project investigating a movie making summer camp over two summers. More specifically, in this study, we employed CAP (creative analytical processes) ethnography (Richardson & St. Pierre, 2005) to answer the research questions.

Context

"Let's Make Movies" is a summer camp for students in grades three through twelve. The camp is the product of an ongoing collaborative effort between the Tampa Theatre and the Florida Center for Instructional Technology (FCIT) in the College of Education at the University of South Florida. The camp has been in existence for over 14 summers.

The camp was typically divided into eight sessions with differentiated age groups. Each session included 20 campers who attended for five consecutive days. The camp sessions were held for three hours each day, from 9 a.m. to noon or from 1 p.m. to 4 p.m. Each day began with a gathering to briefly discuss the day's agenda and to highlight excerpts of feature films in order to discuss the ways that filmmakers present their ideas.

Participants

Approximately 120 students, aged 8-17 years old, attended the camp. There were 72 males and 48 females. The students came from middle- to high-income families and
each participant paid $150 fee for the camp. Eight scholarships were available, and they were distributed based upon students’ performance on filmmaking projects in local public schools.

The instructional and research team included several individuals. James, the camp director, was also a graduate student researcher at the university. He created the camp structure (along with other members of the Florida Center for Instructional Technology) and he conducted all sessions, including the daily lessons on filmmaking. He also analyzed portions of the data. Five paid counselors (Lindsay, Katie, Alex, Allison, Claire) monitored the groups and worked with individual students. The counselors were alumni of the College of Education, with 18 hours of literacy methods coursework, and in their first few years of teaching. The theatre staff managed the logistics of the camp including registration, drop off/pick up, and marketing. Deb, a doctoral student and research assistant, collected and analyzed data. Jim and Jenifer, university faculty, observed different camp sessions and analyzed portions of the data.

Sample

We mapped transformations within one group as a case (Dyson & Genishi, 2005). Using purposeful sampling (Patton, 2002), Deb selected one group of middle-school boys based on 1) their initial project idea (Blair Witch mockumentary) and 2) their various levels of movie-making experience. All of the students were Caucasian. Two of the students, Leo and Joe, were considered “regulars” to film camp. Chase
had attended camp previously. Nick was new to camp but a friend of one of the
regulars. The two counselors who worked with the students (Lindsay and Katie) were
elementary school teachers who had worked with the camp two previous summers.

Data Sources

The data set included: student artifacts (i.e. planning sheets, scripts, storyboards,
movies), videotaped observations, researcher notes, and interviews. After movies were
completed on day five, many post-production interviews were conducted in role. One of
the researchers asked the students about their decisions as directors, actors, writers, and
editors. These data are premised on Heathcoate and Bolton's (1995) "mantle of experts."

Data Analysis

In order to map the complexity of literacy identity formations and interactions,
researchers (i.e. Brandt & Clinton, 2002; Lewis, Enciso, & Moje, 2007) have
recommended employing activity theories. Leander and Wells-Rowe (2006) discussed
their use of rhizoanalysis as a "sociological cousin" to activity theories. Rhizomatics is
a technique derived from the multiplicity-based philosophy of Deleuze and Guattari
(1987) that has been taken up by literacy researchers to spatialize socio-cultural
practices and processes. The methodology used to identify relations within space is
called rhizomatic cartography (Sheehy & Leander, 2004). "Rhizomatics is a
methodology based on rhizomes, not rooted trees, one looks for contradictions and
discontinuities within social life rather than for a cohesive rooted logic" (ibid, p. 9).
Rhizomatic cartography is a methodology for mapping multiplicities of meaning. Kamberelis (2004) stated rhizomes might be described in terms of “lines of articulation” and “lines of flight”. Lines of articulation are the multiple connections that “territorialize” or instantiate the space. For example, in describing the positions or identities enacted by a child during video creation (i.e. script writer, director, actor), lines of articulation or map the observable behaviors that flesh out a given role, as well as the multiple identities that student enacted, and then show how those identities affected the composition processes and/or product. A question that exemplifies a line of articulation might be “What is X doing to define his role?” Alternatively, a “line of flight” is a change in identity, a difference, a new choice. Therefore, a “line of flight” would be exemplified the times when students assumed new positions, took on new roles, changed their role, that may result in changes to the process and/or product through their enacted identities. A illustrative question is “What is X doing that signifies a change in or to his role?”

For Richardson and St. Pierre (2005) writing is a mediating tool; writing is a process for data collection, for data analysis, and for resultant data creation. In order to map the multiplicity of roles, we used nomadic writing to document the emergence of literate identities and for mapping the activity structure. First, we transcribed the digital video of the process into a multimedia scriptwriting freeware program called Celtx (http://celtx.com/). Within this program, we used rhizomatics to map lines of flight as
transitions in activity. For each student, we documented the assemblages of their actions and expressions in order to map the emergences of roles through discourse and activity. We also mapped the activity structure throughout the composition process where we specifically focused on the emergences and changes in social identities. We documented specific episodes in the results section. Then we participated in a subsequent content analysis of the episodes, documenting the social identities enacted. In addition to the content analysis, we used nomadic inquiry to trace how student enactments of social identities affected the process and ultimately manifested in the product.

Subscribing to both Barker (2003) and Weeks (1990) who discussed social identity in terms of sameness and differences, we searched specifically for lines of flight as episodes during the process when students differentiated themselves from the group by taking on social roles.

As a result of this mapping, we determined the strengths in literate identities and enactments of each student and how these enactments affected the processes and products of digital video composition. Looking at each boy individually helped us to crystallize our findings through multiple lenses as we viewed the process through each individual’s emergence of social identities. Then we provided an overview of the most significant episodes in the processes and showed how the discourse and activities lead to social identities. We provided both inserts from the script of the process as well as our interpretations of the activities.
Then, we conducted an inductive analysis (Patton, 2002) in which we developed code categories through open coding (Strauss, & Corbin, 1998, p. 223). We documented the students’ enacted identities in the first column. Then, in the second column, we used rhizomatics to trace how the enacted social identities affected the composition process. Finally, in the third column, we examined the digital video searched for evidence of how students ultimately affected the product.

Results

While they created texts, students took on a variety of different roles, depending on need, in four different manners: students developed in role (becoming); how they acted as a collective (being); they each acted in multiple roles (beings); and they broke from role (breaking). In order to map the emergences and changes in roles, we employed a modified version of Leander and Wells-Rowe’s (2006) rhizomatic analysis combined with content analysis. We followed students throughout the process, identifying instances where they either expressed identifications with roles or were observed taking on roles as needed throughout the process. We documented these identities as they emerged and transformed throughout the process by using a combination of a script of the process and writing a narrative about the script. In the script of the process, the following characters appear: Leo (student), Joe (student), Chase (student), Nick (student), Lindsay (initial counselor), Katie (counselor who took over), James (program director and part of research team), and Deb (researcher). In the following sections we present the data in selected excerpts from the
Celtx. Since these are screen shots from first level data (Celtx), they preserve infrequent grammatical and spelling miscues. For these we beg readers’ indulgence. To “clean up” would have meant altering the data. These selections occur and are labeled in chronological sequence that we borrowed from Northern Film & Media (no date), who depict filmmaking as development, pre-production, production, and post-production.

Simultaneously, we use the unfolding narrative script to provide interruptive opportunities for analysis of three types of role enactments. First, we isolate and analyze role enactments which we call becoming(s). Next, we analyze for the agency gained through role assumption (being, beings). And finally, we analyze for role shifting which we relate to participants’ monitoring for meaning making, where role shifting (breaking) to follow a script is understood as an overt act of meaning making (Gee, 2001).

Development
When this group formed, Leo stood with the planning page and pen in hand (writer). He was the only one talking (director). Leo pitches (pitch-man) his idea. He looks first to the counselor, Lindsay, as if she were a producer (producer). While two of the boys (Nick and Joe) joined the group because they were Leo’s friends (friends) outside of camp, the other boy, Chase, joined because he liked the idea (fan, new writer on team). Leo was the most film literate students at camp (film authority). Each summer, he attends two or three weeklong sessions. Counselors and students alike know him as the “movie guy” (the “movie guy”). While he took the lead in this situation, he took a different role (actor) in a different week—where he did not “have any ideas.” This particular week he came with a strong idea (point of entry text [Kincheloe & Berry, 2004]) about making a Cloverfield or Blair Witch-like horror film (visionary); he wanted to create a “mockumentary” using a handheld camera (director). Lindsay, the counselor, intervenes:

LEO
So there’s this guy who goes into this big house with a theatre inside of it. And he goes inside with his buddy, his cameraman, and while they are talking about the house, his cameraman goes missing, so he has to film the remainder without his cameraman. And ah...like later on he sees a ghost and drops the camera. And then you see his hand... (he shakes his hand) and then it fades out (Leo looks at a counselor as if he wants some validation of idea).

Lindsay, the counselor, intervenes:
Lindsay can be seen as creating the position she asks about, but Joe may have anticipated her. He responds by “mugging” to her request. Joe was the second most active member. He has also attended film camp (film camper) numerous times and attended a pre-camp workshop on the use of Celtx—the screenwriting software used to write scripts (scriptwriter). Although he does not present himself as the “movie guy” like Leo, he demonstrates his film literacy in his conversations and ideas (movie guy). But Joe prefers acting (actor), both in movies and in real life. He is an entertainer (funny guy). Joe forms the group through humor, one-liners, and group insider jokes that create group cohesion.

Lindsay

why don’t you turn your paper over and write in the characters that you need. (Joe and Leo close in on the paper Leo has put down on the ledge. Leo holds the pencil. Other two boys look on). The camera man not the one that’s filming...

Leo

Action: all the boys gather closer. Chase stands up and moves in closer.

Leo: Nick begins to discuss an idea with me on the side. He begins to speak and then draws...
In this excerpt is the first line of flight that we analyze. In this case, Nick, who was the neophyte, moves to talk with the researcher. In so doing, he creates a new and different activity within the group. He has spent the days prior to this group formation with a notebook in hand, constantly drawing (illustrator) and taking notes (note-taker). At the beginning of the project, during the ideas phase, he spent most of the time working independently, designing scenes (set designer) in his notebook. Also, during the development phase, Leo freely discussed his big idea (idea guy). He noted that he would be the main character (actor) who was making the mockumentary. Although he did not name himself as the “director,” through his knowledge, actions, and stream of ideas, he occupied this role for the first part of the moviemaking (director).

LEO
So this is going to be a documentary

JOE
What’s this a mix of? Cloverfield and what?

LEO
Blair Witch.

JOE
Is it a spoof?

CHASE
What’s Blair Witch?

Through Joe’s discourse with Leo, it is also evident—through his use of movie discourse, like spoof—that he is movie literate (movie guy). “What’s this a mix of? Cloverfield and what?” sounds as if it could come from professional filmmakers. But
Chase is unfamiliar with *Blair Witch* and his lack of resources again marginalizes his role, as the other group members continue to plan their characters for the movie.

**LEO**
We need a name for the man. We can't just call them man 1 man 2.

**JOE**
I'm the camera man. I can be called Leo.

**KATIE**
What do you want your name to be in the documentary?

**LEO**
don't know

**LINDSAY**
A lot of times in documentaries you are yourself so.

**LEO**
it's a mockumentary though. It is not really happening.

**LINDSAY**
you just made up a word.

**JOE**
it's a word that's in the YouTube dictionary most likely.

**LEO**
no it's real. It's on IMDb

**JOE**
Oh, same thing.

In this scene, Leo and Joe discuss movie genres with greater knowledge than the counselor, especially considering his use of “mockumentary” and subsequent discussion. Both Lindsay and Katie (counselors) appear to counter the boys’ discourse-fueled power by disrupting the flow with questions that would change the focus, if followed. The boys’ discourse about the IMDb (Internet Movie Database) and its similarity with YouTube, showed that both of these boys were familiar with these websites, again more familiar than their counselor. Through this dialogue, they
both formed expert social identities as movie literate (movie guys) and also Internet savvy (computer guys). They continue developing their scene:

**LEO**
Maybe they could go for a sleep, the cameraman wakes me up and says to me. I’m going to go to the rest room and I’m going to put the camera right here. ...during...he gets attacked and killed and the camera’s all like (waves his hands). The man comes and walks toward the camera and sees him on the ground and says “Oh my god where are you? Wahh!” (makes a scared face)

**JOE**
It would be funny if the camera guy gets scared.

**LEO**
How does the camera guy die?

**JOE**
I don’t know. He drops the camera.

**KATIE**
We have to find out how camera guy loses the camera and ends up dying.

**LEO**
Well like.

There is silence.

**NICK**
Could I go downstairs? I have to look at something. (He shows a sketch the scene Leo and Joe were discussing in his notebook).

While Nick goes downstairs, with notebook in hand, to check out the setting (location scout), Leo and Joe continue to discuss the scene with Lindsay. They are interrupted by another counselor, Katie, who is creating an overall master-planning sheet for the camp. Leo shares his planning sheet (director and idea guy) with Katie and answers her questions. Joe tells her about the characters (actor) and actions (idea guy). The boys continue their character planning. Katie’s needs for group
progress information disrupt the progress of the group.

\[
\begin{align*}
\text{LEO} & \quad \text{I got lots of room for names so.} \\
\text{JOE} & \quad \text{guy one guy two} \\
\text{LEO} & \quad \text{Audience? family?} \\
\text{LINDSAY} & \quad \text{yep.} \\
\text{JOE} & \quad \text{I'm the camera guy that's me.} \\
\text{LINDSAY} & \quad \text{duration is four to five minutes.} \\
\text{LINDSAY} & \quad \text{and the deadline is Friday.} \\
\text{JOE} & \quad \text{I'm the camera guy.}
\end{align*}
\]

Action: nick is busy with his image in his notebook throughout this time. Chase is just listening.

But they quickly return to task. Joe is “the camera guy.” When he says this, he looks at everyone in the group confidently with a big smile on his face, holding his hand as if he were holding a camera (actor). Joe was in character. He would be the camera guy, a character in the script. He knew he was the only comic relief in a horror movie and that he would “die” near the beginning—later the boys mentioned that the comic relief always dies first—in an offhand manner—as if it were an obvious genre distinction. Just as Leo became director in the movie and in real life, Joe emerged as the comic relief both in the movie and real life. He acted out his ideas during this time as an actor (actor) and a character (funny guy). Lindsay frames the project within its limits, through which she controls the project from the outside.
Nick located the iron gates in the basement of the theatre, and these would figure prominently in the film. Gates enter the script as Nick’s visual creation. His abilities to visualize and draw are used as an entrée to the group processes. As the group moved further into the planning, Joe (idea guy) and Nick (set designer) combined their ideas for scenes in the story. Chase sat and observed (observer). Whenever someone in the group suggested a new idea, he moved in closer (interested observer and listener), listened carefully and/or observed the written/illustrated idea. During the ideas phase, he sat quietly and listened. After the session, he noted that he chose the group because he liked the idea. However, he hadn’t added much to the conversation because he was not familiar with Blair Witch.
He said he planned to rent it that evening so he could come up with ideas for the script the following day (planner).

As indicated in Figure 1, during the development time students took on a variety of roles (beings). Each role is then furnished with the resources that each boy brings to it. And the significance of the inhabited role is conditioned by the social value of its performance. These values impact what is and is not eventually absorbed into the film. Leo and Joe were the most active and also the most experienced with movie camp. They were also the most film literate, bringing in their Discourses from previous camp episodes as well as their previous uses of digital media. Leo was clearly the leader in terms of digital literacy and movie literacy. He was the resident movie-guy and made himself the lead director and planner through his dialogue and actions. The other boys gathered around him during the process and listened to his suggestions. His big idea ultimately became the main focus of the movie.

Joe clearly was the actor. He liked to get attention by acting either in role, as a funny guy, or coming up with creative ideas. During the process, he was instrumental in keeping the energy positive and the activity level high. His clever one-liners and funny-guy humor ultimately showed up in the product.

Nick and Chase were not as vocal as the other two boys. Nick seemed to feel most comfortable speaking with one or two people at a time, not a large group. He was the illustrator and created a role for himself as location scout and set designer.
This skill gave Nick cultural capital (Bourdieu & Passeron, 1973) within the group. Ultimately, his careful planning showed up in the movie scenes. Chase did not outwardly vocalize at this point of composition. However, he was fully engaged with the planning. He observed and listened closely through the entire session. Chase’s attention provided another audience member for the idea generation in the group. Although not outwardly vocal, his actions fed into the activity structure.

*Figure 1: Content Analysis of Development Stage*

<table>
<thead>
<tr>
<th>Student</th>
<th>Social Identities</th>
<th>Effect on Process</th>
<th>Effect on Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leo</td>
<td>Movie guy</td>
<td>All students look toward him as the leader. He is in charge of the group and ultimately the idea.</td>
<td>His idea manifests in the final product.</td>
</tr>
<tr>
<td></td>
<td>Idea guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pitch man</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Computer guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joe</td>
<td>Actor</td>
<td>Joe’s acting in role provides energy for cohesion and creative, playful group dynamics.</td>
<td>Acting and creative one-liners evident in the final product.</td>
</tr>
<tr>
<td></td>
<td>Funny guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Idea guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Movie guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Computer guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nick</td>
<td>Illustrator</td>
<td>Notebook gives cultural capital to Nick as a scene planner.</td>
<td>His scenes and settings are used in the movie.</td>
</tr>
<tr>
<td></td>
<td>Location scout</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Set designer</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chase
Listener
Observer
Planner
Begins on periphery but moves in as attentive listener. He is a good audience for ideas.
His prop suggestions show up in movie.

Pre-Production

Once the group was nearly finished filling in the initial planning sheet—where they planned the story outline, the characters, and the props—they began to write the script. But the scriptwriting here also involved enactments during the writing, trial runs of the ideas. Leo sat at the computer and took charge as head writer (head writer); the other boys gathered around him, providing dialogue and other ideas (idea guys) as he typed the script into the screenwriting software program on the laptop computer.

Because Joe was the resident expert with Celtx—he had attended the workshop James held prior to camp—he sat next to Leo and helped him use the software (screenwriting expert, computer expert). Joe and Leo formed a scriptwriting dyad. However, when the thinking slowed down and Leo didn’t need Joe’s help with the Celtx software, Joe acted in character (actor) or as a character (funny guy).

As the group settled in, James (camp director) checked in with them and noticed Nick drawing in his sketchbook. He suggested that Nick could do the storyboards. The suggestion created a potential break in the role structures. However,
Nick continued to create his big idea scenes in his notebook, so the counselor asked Chase if he would like to be the story-boarder. He accepted and enthusiastically began his task. After Leo typed the first few lines of dialogue and action, Chase listened and drew the shot on his sheet (storyboarder). Then he turned to a counselor and asked if it was okay.

---

KATIE
I thought you were going to say I bet you won’t spend the night there.

LEO
Yeah it’s a bet.

JOE
So I bet.

KATIE
Who’s going to bet? Okay so you say spend the night and the other guy says what?

LEO
Spend the night there and stay alive.

CHASE
So is this okay?

CHASE hands his storyboarding page, where he has completed the first shot, to a researcher.

---

Interestingly, like both Nick and Leo, Chase handed his first attempt to an adult to validate before he shared it with the whole group. The adults (both counselors and researchers) were viewed as digitally and cinematically literate by the students. The students knew that if they had questions about technology or movies, they could ask the film camp adults. This authority checking becomes interesting when, in later stages, the boys’ perceptions of authority reverse, and peers become the “value added” audience.
As Chase became storyboard artist (storyboader), he also began to contribute his ideas for the script (idea guy), revising what Leo had already written. He started with one suggestion and once it was validated enthusiastically by both Leo and Joe, he became a much more active contributor during scriptwriting. Chase worked side by side with Leo on shots (storyboader) and the dialogue and actions (scriptwriter) together. Nick continued to design scenes (set designer) in his note pad and to choose theater settings for them (location scout). Joe continued to act in role (actor) as he tried out dialogue and actions for the script (actor). When things slowed down, Joe kept everyone entertained with comic relief (funny guy).

Leo continued to type the script (head writer) in a manner similar to how a teacher would conduct a shared writing. He listened to the other boys’ ideas and wrote them down. When he came to a “trouble spot,” he rehearsed with the other
boys until he felt like the dialogue was correct. He worked closely—and mostly silently—with Chase during this time. While he wrote, Leo shared the screen so Chase could complete the storyboards (storyboader). Leo and Chase were now the scriptwriting dyad (writers).

NICK
(speaking in funny "evil" voice)
Spend the night.

LEO
Do you want to say that?

JOE
Yep yep yep

CHASE
That would be fun.

JOE
I see a ghost. I figure out if I bring a little bear with me to make it funny.

LEO
Dude we are trying to make this scary. As little funny as possible.

KATIE
What scene are you on now?

LEO
halfway through the second scene.

KATIE
Don’t worry, you’ll get it all done.

CHASE
The comic relief always dies first.

At this point, it felt as if the group members had identified with their social role “becomings” as they worked as a cohesive unit, bringing their strengths into the process. On one hand the counselor was able to sit back, let the boys function as a team, and only check in every so often. But the disconnect that these interruptions provided was an interesting finding, that we take up in the discussion section. During the scriptwriting, there were many moments like the above scene, where the boys
worked as a cohesive unit. In these situations, they finished each other’s sentences and edited each other’s dialogue. In essence, they functioned as one collective brain, a collective intelligence (Durkheim, 1967) one “being” all heading for the same goal. When the initiative became blocked, there was a disruption. Katie’s request for scene marking disrupts, causes a difference that can actually move the process.

Joe’s attempt to include humor into the script is rejected along genre lines. It is interesting that the second rejection is delivered by Nick, echoing, agreeing with, and/or imitating Leo’s pervious rejection. The boys discussed their script, remarking on genre elements of horror films and video games where the funny guy dies first and the nice one next. As evident in the scene above, they all contributed to the scriptwriting (all scriptwriters). Joe (actor) often spoke of his character’s actions in first person: “if I get scared”.

**JOE**
I have pillow and sleeping bag and a teddy bear so if I get scared.

**NICK**
We don’t want funny parts.

**LEO**
A roll of film. The comic relief...in horror films...I've heard it a hundred times...dies first

**NICK**
Like in my video games. The funny guy goes first.

Chase nods in agreement (he's said this before)

**NICK**
The nice one next.

**JOE**
Here’s my bear.
There were many creative flows like the one above. They group also experienced distractions. For example, the group next to them was creating a 24 spoof that used the video game *Guitar Hero* as a challenge. When they saw the game, they began a discussion of their own video game likes and dislikes with one of the researchers, Deb, and gave her their expert (*gamers*) advice. Here distraction can be understood as refocusing. The refocusing is accompanied by changes in role, which Gee (2001) suggests are indicative of learning.
Disruptions happen. But unlike classroom teachers’ manipulations that are intended to sustain attention, these projects draw the writers back to their tasks, perhaps from a different perspective. During the scriptwriting and storyboarding, the boys repeatedly access the resources that they each brought to the project. When Leo came to the “I’m scared” scene, he searched for Blair Witch on the Internet so the other boys could see how the shots were arranged. The boys worked with one of the researchers (Deb) and further built their technology literate identities (computer guys) searching for a specific clip on YouTube.
Deb considers censoring the boys’ proposed search but decides against it. As was further evident by this example, the boys continued to inhabit a variety of positions and enact different social identities. Additionally, they continued to bring in their outside Discourses (computer literacy, movie literacy, gaming literacy) into their
group culture. They also discuss genre knowledge of trailers, of viewer maturity rating systems, which are both productively deployed in information search scenarios. As they participated in discourses that were not related to the immediate task at hand (lines of flight), these “like Discourses” as shared insider knowledge, bond the group into a more cohesive unit.

In this stage, Nick and Chase took on a larger number of roles. As Nick gained the social identity of scene designer, the other boys paid attention to his work and he, in turn provided more ideas to the group. His work appeared in the final movie scenes that were well conceived and believable on screen. As Chase took on an active role as storyoarder, he began to contribute many more ideas. He also moved in and became a much more vocal and active member of the group. His concentration and attention to details helped organize the work. Ultimately this manifested in the product as a coherent story—with no continuity disruption to the film.

*Figure 2: Scriptwriting and Storyboarding during Pre-Production*

<table>
<thead>
<tr>
<th>Student</th>
<th>Social Identities</th>
<th>Effect on Process</th>
<th>Effect on Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leo</td>
<td>Idea guy</td>
<td>Leo takes charge of writing. Students gather as he conducts a “shared writing” where everyone contributes.</td>
<td>Organization of the planning ideas. Good dialogue. Scenes well planned. Action well thought out.</td>
</tr>
<tr>
<td></td>
<td>Movie guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Head writer</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Computer guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joe</td>
<td>Knows Celtx</td>
<td>Joe helps Leo use Celtx. He also provides group cohesion and animated dialogue.</td>
<td>Acting and creative one-liners evident in the final product.</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------</td>
<td>-------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------</td>
</tr>
<tr>
<td>Idea guy</td>
<td>Character (comic relief)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nick</td>
<td>Illustrator</td>
<td>Brings group together to think of scenes as the whole picture</td>
<td>Complex, well planned scenes add to the believability</td>
</tr>
<tr>
<td>Location scout</td>
<td>Scene developer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chase</td>
<td>Storyboarder</td>
<td>Brings organization and detail to the process.</td>
<td>His clever word choice and organization show up in the movie.</td>
</tr>
<tr>
<td>Idea guy</td>
<td>Good with words</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Production**

When the script was done, the group moved into the filming stage. The four boys had already established their various social identities in the group. They had functioned as one “being” during script creation and formed a group identity. During the filming, they fell in and out of multiple roles (beings) as they performed as actors and functioned as filmmakers. Because filming was a more active time than planning and scriptwriting, all of the boys acted more into their social roles/identities during this time.

In order to form multiple roles, the boys broke in and out of roles (breaking). Breaking represents the strategic move that creates a new identity. Reasons for breaking into or out of roles came as position needs shifted. For example, Leo
vacillated between director (telling the actors what to do) and actor (listening to what the other directors told him to do). While directing, Leo was more verbal and commanding. While acting, he listened and cooperated with whomever was directing his actions. He also served as videographer and set designer when these positions were necessary. As a director, Leo stood out as someone who really knew what he was doing. He had his own individualized method of counting down - three, two, one, action, but given in successive silent hand signals. Interestingly, he was the director both in role (in the movie) and out of role (in real life).

Joe fell right into his acting role (actor) while filming. He was the comic relief in real life as well as in the movie. He practiced his lines and knew what others were supposed to say. He coached and helped the other boys put words to life (director). He also led the group forward, suggesting scenes they could do next.

During filming, Chase showed his attention to detail as he edited (on-scene editor) and revised both dialogue and actions on the spot. He discussed how they should say things, shoot things, show things, and do things. He also became more part of the group and used wit and his knowledge of technology as a “ticket” (see
Dyson’s [1997] text as a ticket). He took on a director’s (director) role when the other boys were acting. When he was acting (actor), he listened to their suggestions and modified his behavior.

Nick, on the other hand, was much more of a “behind the scenes” kind of guy. He kept his scene designer (scene design and location scout) identity and planned how actions should be set up in the scenes. He became more vocal and took on a director’s (director) role as well, telling actors what they should do and where they should stand. He also took on a small acting (actor) role and used a “silly voice” for the dialogue. During this time, he was less likely to be designing independently and became more interactive with the group.

During filming, the identity performances were mostly enacted as lines of articulation (enactments of specification, examples that are consistent with the current role designation); students changed roles as needed in order to transmediate their text (script), illustrations (set designs and storyboard shots), and ideas into performed action. Changes in direction (lines of flight) were largely a matter of role shift to complete a needed task. Actions were directed toward the group goal and completed as a collaborative effort. The social identities the students had previously engaged with during development and pre-production scriptwriting were strengthened during this time. Additionally, during this more active part of the process, students all acted and stayed on task.
Breakings of role also were prompted by disruptions to process from outsiders’ interventions, as illustrated by the disruptions from counselors, researchers, and camp directors. However, these role shifts that may result from disruptions cannot be considered a negative impact, as the line of flight (new idea, new action) that results may in fact contribute to the final film in ways that cannot be known at that moment.

Figure 3: Filming during Production

<table>
<thead>
<tr>
<th>Student</th>
<th>Social Identities</th>
<th>Effect on Process</th>
<th>Effect on Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leo</td>
<td>Actor</td>
<td>Organizes filming around his big idea.</td>
<td>Product is easy to understand and follows a big idea.</td>
</tr>
<tr>
<td></td>
<td>Movie guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joe</td>
<td>Actor</td>
<td>Joe’s acting in role provides believability and encourages others.</td>
<td>Acting and creative one-liners evident in the final product.</td>
</tr>
<tr>
<td></td>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nick</td>
<td>Location scout</td>
<td>Notebook gives cultural capital as a scene planner.</td>
<td>His scenes and settings are used in the movie.</td>
</tr>
<tr>
<td></td>
<td>Scene developer</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chase</td>
<td>On scene editor</td>
<td>Coordinates problem solving in acting and dialogue, which smooths process.</td>
<td>Shows up in the movie as good one liners and shots.</td>
</tr>
<tr>
<td></td>
<td>Idea guy</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Actor</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Once the filming was completed, the group downloaded their video clips onto a computer and began to edit. Although Leo took an active part throughout the other activities in filmmaking, engaging with multiple roles, this changed when they began editing the movie. Although he provided a few suggestions at first, he took a back seat to Chase—who eventually took over (editor). Instead, Leo identified himself as “really good with GarageBand” (music production software) and suggested some sounds. He assisted Chase with the resources that he controlled (GarageBand). But Leo insisted that the movie must not have a name so the handheld camera would seem more authentic—as if it were live. However, after that, he let the movie fall into place until they came to the titles and credits.

Chase is editing and Joe sits down beside him.

CHASE
This is the scene where Joe is going to sleep. We have walking in the theatre and going to sleep.

KATIE
Here is the script.

JOE
okay.

KATIE
Remember you have the viewpoint of the ghost thing and your viewpoint.

JOE
I thought we cut this off earlier.

CHASE
yeah, alright... does that look good?

JOE
Maybe cut it there? How do we do both views? We have this view then how do we show the other?

KATIE
Which one do you want to use?

CHASE
This one.

Points to the clip in the storyline.
Nick sat down and began editing (editor) beside Chase and the counselor. He also continued to interact with the group (group member). While watching clips, he provided suggestions for editing (editor). During this part of the activities, he put down his notebook.

Joe also sat down next to Chase and offered his input, periodically. He critiqued clips and offered recommendations (editor). When the editing became more complex, he stated, “I’m confused” and lost interest until a more creative part of editing—music, credits, titles—came up. Then he again became an active contributor (editor, idea man for sound effects, titles, and credits).

Ultimately, during the editing process Chase took center stage (main editor). His listening and attention to details were strengths in editing (continuity editor). He added transitions where needed and cut where things needed to be cut. He sat through the entire editing process and eventually took over, after the others had lost interest. He provided the production company logo—flying banana—which united the
boys as a production company (producers). Joe thought of how he created a production company logo (Kenny the Lizard) for a previous film (producer) and helped the team put together their image and music. Their identity was sealed as a bunch of funny/crazy guys who created a scary movie. Chase took over the movie production as the editor and the “inventor” of the production company, and the other boys respected his opinions in this position.

Figure 4: Editing in Post-Production

<table>
<thead>
<tr>
<th>Student</th>
<th>Social Identities</th>
<th>Effect on Process</th>
<th>Effect on Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leo</td>
<td>Editor Good with sound</td>
<td>Lets up with his control and lets others take over.</td>
<td>Musical talent in the final product. His influence is still prevalent.</td>
</tr>
<tr>
<td></td>
<td>Producer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joe</td>
<td>Producer Editor</td>
<td>Works closely with Chase for a while and then amuses rest of group when they get restless.</td>
<td>His editing as well as shot choices shows up in the final product</td>
</tr>
<tr>
<td>Nick</td>
<td>Editor Actor Producer</td>
<td>More involved with group members than his individual work in notebook.</td>
<td>His funny voice shows up in movie.</td>
</tr>
<tr>
<td>Chase</td>
<td>Director Editor Producer</td>
<td>Chase takes over the process willingly. Enjoys editing. Is</td>
<td>His attention to detail and close editing make for an excellent movie with</td>
</tr>
<tr>
<td>Detail guy</td>
<td>very patient and detail oriented.</td>
<td>little to no continuity errors. The shots flow smoothly and the transitions are meaningful.</td>
<td></td>
</tr>
<tr>
<td>---------------------------</td>
<td>-----------------------------------</td>
<td>------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
</tbody>
</table>

As researchers, we noticed students bringing Discourses into the community, falling into particular roles, and enacting social identities, we were also interested in asking them about their identifications with these roles. What were their self-identifications? During the directors’ interview, some of the students self-identified about their roles.

**DEB**
Did you feel in role during the movie?

**LEO**
No not really

**DEB**
Did you feel like a filmmaker

**LEO**
oh yeah!

**CHASE**
In the movie you use your real name

**LEO**
oh yeah.

**CHASE**
I'm guy seven. He's guy one (points to Nick). We just have short parts in the movie so we just have little names. He's guy one because he speaks first.

**DEB**
Did you feel like real directors?

**LEO**
Yeah when we were behind the cameras.

**DEB**
What else?

**CHASE**
When we are editing it.
During the interview, Leo discussed how he really felt like a filmmaker but not like his character. He distinguished between the working roles (director, set designer, videographer, writer) and the performing roles (actor). Interestingly, Chase noted he felt like a real director most when he was editing the movie. This matches with his “take-over” role in the editing part of filmmaking. He identified most as a filmmaker when he was in control of a role.

Whether the boys self-identified with the roles or they performed in the roles as social identities, their actions affected both the processes and products of digital video creation. Through mapping the actions and expressions of the individual students and then tracing how performances of social identities affected composition, we obtain an activity structure where each identification affects the process. When a student identifies as a movie guy, others listen to his ideas. When a student creates an impressive diagram, the other boys pay attention and get more ideas for the movie. Each new performance creates new learning and ultimately reforms the process and manifests in the final product.

Discussion

From a sociocultural perspective on literacy (Moje & Lewis, 2007) recommend bringing activity theory, cultural studies, and discourse analysis together in order to shift “analyses from specifying only how people’s goals, desires and needs shape an activity’s production toward an emphasis on how people produce and resist the
power of others’ desires as they engage in particular activities, situated within the particular activities and activity systems an activity theorist might analyze” (Moje & Lewis, p. 24). Using rhizomatics as a method for mapping activity structures allows for the analysis of both discourse and actions. In addition, rhizoanalysis also allows for the discrimination between the discourse and the actions that produce sameness (lines of articulation) and as well as those that produce difference (lines of flight). This is a useful construct when describing how students’ actions either elaborated the existing process or added something new. Through tracing these lines of flight as differences in social identities, we discovered how different students activities were essential to driving the process.

In this study, we think combining rhizomatic analysis with qualitative content analysis helped clarify our results. Using rhizomatic analysis, we were able to trace the becomings of social identities, identify times when the group functioned as one being, and how individuals broke into and out of roles to inhabit multiple social identities throughout the process of digital video composition. The strength of rhizomatic analysis is that we attended to multiplicities and differences (as lines of flight). Viewing social identities through what Barker (2003) and Weeks (1990) discussed as the sameness and differences, rhizomatic analysis allowed us to map sameness (through lines of articulation) as well as differences (through lines of flight).
Furthermore, when we applied content analysis and identified the roles students inhabited throughout the process, we were able to complete a summary of how students appeared in time (as a social literate identity) and in space (how their enactments of literate identities affected the processes and products of digital video composition). Using further rhizomatic methodologies combined with content analysis, we were able to trace how students’ enactment or performances of social identities affected the composition processes. Another look at Figures 1-4 provides a powerful comparison of just how much impact each student’s individual actions and dialogue had as they manifested in the product. A less extensive analysis of the roles might produce a false impression that the boys simply helped create Leo’s movie; when, in fact, they all had a very significant impact on both the processes and the product. Certainly, part of this movie belongs to Leo, just as parts belong to the other group members. But looking singularly at pieces and parts distorts what actually happened. Each aspect, each contribution is stamped by the social activity network in which it was created. By the same reasons, the group would have been different without this particular movie idea.

The impact was created through the boys’ performances of literate social identities. Filling positions emerged through their needs to complete a project of their own design. As a job opened, students filled the positions and enacted the roles. In the ideas phase, the other boys joined Leo either because they were his friends or
because he had a good idea (or both). This initial idea of creating a Blair Witch/Cloverfield-like movie was initially described by Leo. However, throughout the process, all of the boys fed into this grand idea. Examining lines of articulation allowed us to identify how the individual boys’ literate identities fed into the shared goal of what had been Leo’s idea. While Leo self-identified, and was identified by group members, as a leader ("it’s his idea"), all members contributed. For example, Joe’s comic acting created a strong group bonding. This same comedy also added significantly to the voice and acting in the movie. Nick’s detailed visualization and drawing of scenes led to him becoming the scene organizer ("The camera should be here." "You stand here." "We can film like this." "We can film from here."). Such organizing also helped the group to coordinate the complex filming of two cameras (one stationary and one “live”). Chase started out as a listener and proved to be extremely detail-oriented. He was a watcher and a thinker who sprung to action when he felt comfortable and when he noticed a discrepancy. He edited on the spot and grew from being on the sidelines at the beginning to the master editor at the end of the process.

Educational Implications

The close mapping and coding of activities also provided us with some important educational implications. First of all, we noticed that although students showed confidence with the outside Discourses they brought into camp, they were less
sure of their initial ideas as they developed new roles in camp. Three of the boys—Leo, Nick, and Chase—initially tried out their new ideas with one of the counselors or researchers before they brought them into their peer group. The strategy here was surprising as a reversal of what we would have expected. Counselors would normally be regarded as a final audience with peers consulted to get ready for the counselor. This means that the source of authority had shifted to the peers. This is perhaps the result of working in real roles on authentic literacy projects. It indicates to us that the power that drives media revision is generated by the authentic audience and not the teacher.

Secondly, within the camp culture, there were many positions available for a wide variety of literacies. Students were able to discuss ideas, use cameras, plan writing, type in a computerized scriptwriting program, draw on storyboards, act, create music, and work with editing software on a computer. These were the working literacies. There were also playing literacies that created cultural capital for the students. For example, their discussions about video games, what movies they had watched, what actors and directors they liked, what TV shows were the best and why, and their uses of the Internet – all provided an “in” to the group as they found shared likes (used as Discourse to form literate identities).

Thirdly, project shifts cause role shifts in individuals. At the beginning Leo and Joe dominated the planning and organization due to their experience. The other boys
became more active, coming into the project by taking on positions and showing/telling what they could do. Nick’s greatest strength was his visualization and scene organization. He initially showed his ideas to one of the researchers, another instance of authority shifting in peer-authenticated literacy projects. This transfer of authority ownership, combined with the students’ active resistance to counselor-imposed guidance, is strong evidence for students’ ownership of their projects and the identities they assumed to get the work done. Later, Nick shared his ideas with the whole group. Chase used this same strategy in his assimilation of the editing. When the group began to edit, Chase watched carefully and moved into position to take over.

Fourth, while we presented our results in a sequence of activity, the lived events actually appeared more chaotically. Our use of the framing of development, pre-production, production, and post-production (Northern Film & Media, no date) only partially represents the movie camp. For example, idea generation as a strategy, or acting in role, or editing all happen all the time. There is reason to use the sequential model, as activity structure is contributing to a finished product (the goal). But roles and strategies are used at the point of need.

Fifth, students who feel comfortable in a situation may vocalize the roles they wish to enact. Alternatively, students who are new to the situation or group often quietly fill positions as they become open and/or create positions based on their
strengths. Educators should be aware of situations where they could suggest positions to otherwise less-active students. It is important for educators to identify a wide variety of “literate” positions in a classroom environment. When literacy means passing a test, only the students who pass the test are considered literate. If students are given a structure that allows them to experiment with multimedia and multiple modalities for representation of their ideas, they are more likely to find themselves as literate and see the results of their hard work as identified by their group members and manifest in their products.

And finally, we are currently examining the function of disruption as an “all the time” phenomenon in movie camp. At this point, we are not convinced that disruption is necessarily a “bad thing.” When James (the camp director) or Katie (the counselor) asks for anything, they necessarily interrupt the creative processes of the group. But unlike in a classroom, where the boys would likely be adhering to teachers’ specifications, interruptions in moviemaking cause group members to revisit their recently abandoned task with a new perspective, as a line of flight. This is potentially a benefit to their creativity.

In professional filmmaking, a community coalesces around a film project. For members of this community, even though defined roles are ultimately attributed in screen credits, participation entails a variety of collaborative endeavors. A director may revise a script; an actor may direct; a screenwriter may coach an actor. Further,
we do not mean to suggest that the roles we mentioned here are static or overlapping. Rather, we see them as fluid and mutually entailed. Even in professional filmmaking where roles are more clearly separated, directors can be actor-focused (Woody Allen) and perhaps less involved in technical aspects in filmmaking. Conversely, directors may be focused on the technical aspects of filmmaking (Ridley Scott), and less interested in the workings of the actors. Of course, this reasoning does not mean that Woody Allen doesn’t attend to camera angles, nor that Ridley Scott doesn’t listen carefully to line readings (Tirard, 2002).

In our community, roles for directors, as well as the roles for other aspects of filmmaking (Taub, 1994) were used in a manner that was similar to the variety found in Tirard’s study of modern directorial method. Therefore, we do not predetermine what roles there will be; nor do we know their instantiations of the fairly generic role expectations (actor, director, writer). So, the teachers, coaches, and the students form a community with variable competencies and experiences with filmmaking. In their fluid deployments of filmmaking roles, the participants learn when they shift their identities. And identity-shifting is the sine qua non of the experience.
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Creating Places to Connect and Empower: Multimodal Literacy

Accommodations for Pre-service Teachers with Reading Difficulties

by

Margaret Krause and Julia Hagge

Margaret and Julia were Jim’s doctoral students at the University of South Florida.
Dear Jim,

What an incredible journey we took together during our doctoral work with you. From the intellectual conversations you stimulated about linguistics surrounding our study of the Devitt’s *Ignorance of Language* to your endless enthusiasm for our work pertaining to reading difficulties, you never ceased to engage us in a way that will undoubtedly have a lifelong impact. Both of us came to the doctoral program with a feverish desire to dig deeper into the complexities of the reading process. When terms like “dyslexia” were not sexy at all, you encouraged us to push boundaries in our work across a variety of contexts. We studied with cognitive neuroscientists, visited MIT to study the reading brain, and we even looked critically at our work with literacy teacher preparation. The best part of all of this was that you not only encouraged us, but you learned alongside of us. This openness to new understandings and shared dialogue allowed us to develop a sense of freedom to embolden ourselves as scholars in the field, despite considering perspectives that might not always be the most popular.

We often coined ourselves as the “German Duo”, largely because your enthusiasm for our work connected us in a way that led us to connected scholarly work we continue to share 4 years post-graduation. More importantly than our scholarly work, the environment where we shared our doctoral experience (largely facilitated by you) provided a place where we developed a lasting friendship. We laughed and cried, we were often overenthusiastic about how we could change the world, and we truly developed a deep sense of the importance of relationships as we grew in our scholarship. Thank you for your part in cultivating that rich experience!

We wish you happiness as you transition into retirement. We cannot promise that you won’t get a random call here or there when we need to run an idea by you... The German Duo hopes to strike again with some powerful work in literacy, and there aren’t many others who would support our work in a more powerful way than you.

Much Happiness and Love!
Margaret and Julia

P.S. Attached, you’ll find our first co-authored piece. It was never published, but it served as a stepping-stone for work to come.
Creating Places to Connect and Empower: Multimodal Literacy Accommodations for Pre-service Teachers with Reading Difficulties

“The kind of person who can live well in this world is someone who has acquired the capacity to navigate from one domain of social activity to another, who is resilient in their capacity to articulate and enact their own identities and who can find ways of entering into dialogue with learning new and unfamiliar social languages.”

Cope & Kalantzis, 2009, pp.173-174

The introductory quote by Cope and Kalantzis (2009) provides a backdrop for the literacies essential to access our dynamic, globalized world. In traditional academic settings, literacy practices are often confined to the navigation of print-based texts, arguably limiting opportunities for learners to become successful navigators of texts existing in authentic settings (Unsworth, 2014). This current study explores the affordances of literacy experiences outside the confines of traditional literacy practices for university students who reported struggles with literacy throughout their schooling lives. See the following YouTube video for a rationale for our research (Multimodal Literacy Accommodations: https://www.youtube.com/watch?v=1BEzUceAntE). As literacy instructors within a pre-service teacher education program at a large southeastern university, we talk about literacy all the time. We collaborate in
course planning meetings, discuss instructional practices we expect our pre-service teachers to enact within classroom settings, and we speak often about instilling desire within our students to accommodate for learning differences that will certainly occur with their groups of future students. One day, during a seemingly ordinary meeting, we came upon a question that made us stop and think: Were we accommodating for our students’ learning differences? Why, of course we were! We adopt strategies in our teaching we hope will ultimately transfer to our students’ teaching. We read feverishly about literacy practices, and we subscribe to literatures, which address the dynamic nature of literacy in the 21st century. In fact, we considered ourselves to utilize a great deal of multimodal instructional practices within our literacy courses. But, we began wondering if these practices were truly a part of the differentiation process for our students with self-disclosed learning difficulties. Did our students perceive these practices to be tools for accommodation? And further, how did these instructional practices affect students’ perceived abilities as reading teachers?

**Margaret’s First Day in RED 4310 - “Meeting Brian”**

It was the first day of RED 4310, a foundational course in reading instruction. I watched as a sea of newly admitted education majors eagerly entered the room. As the students entered, I noticed their glances in my direction. It was a familiar “sizing up” in which I grew accustomed as an
instructor at the university level. Hurriedly, the students scouted out their seats among the selection of desks arranged in collaborative groups. On the first day, there is always an awkward silence as students find their place. I was about to begin class when the final student entered the room. He immediately found a desk situated in the back of the room, which completed one of the collaborative groups. Discreetly, he accessed his notebook and pen, and he glanced around the room with a look of apprehension.

It was a surprise for my new students when I introduced the course purpose in a relatively non-traditional way. Rather than accessing a structured PowerPoint to review the syllabus, I displayed a Wordle (see Figure 3) on the large screen in front of the room. A Wordle is an application, which allows users to make “word clouds” by entering in text of the user’s choice. In order to create my word cloud, I pasted the course objectives into the Wordle application, and it generated a colorful display of words included in the objectives. Some of the words were large, while some were small. Likewise, some of the words were positioned in the middle of the Wordle, while some were situated on the outer edges. I asked the students to engage in conversation about the words displayed. I wanted them to determine the rationale behind the display of words. Why had I chosen these words to display? Also, I wanted the students to think about the positioning and size of
the words. Why were some of the words larger than others? Did this support their rationale about the purpose for the Wordle? Would they position the words differently? I listened as they engaged in discussion about the word cloud.

Figure 3: Wordle

As I circulated among the students, I listened to the students’ responses. Most of the students engaged in thoughtful conversation about the words. They were discussing word placement and size, while “breaking the ice” with new classmates. As I listened to the conversation of the group in the back of the room, the group the seemingly apprehensive, late arriving student chose, I was surprised by the discussion. I overheard the male student say, “Wow, this isn’t
what I expected. It’s nice to be able to talk with one another while we are working through this activity.” One of his fellow group members stated, “I agree. So often, we go through a whole class without ever having the opportunity to look at anything but the instructor and a PowerPoint.” At that moment, I realized the students were engaged in learning about the rationale of the course. We continued a relaxed format that day with activities, group work, and of course, the usual sharing of the semester’s goals and assignments.

After class, the once apprehensive student approached me quite confidently. He stated, “Mrs. Krause, my name is Brian. I want to inform you that I have a processing disorder. I have trouble taking in too much information at one time, reading difficult texts quickly and with strong comprehension, and presenting information orally. I want to let you know this now, at the beginning of this semester, before I become overwhelmed. I have educational accommodations agreed upon by the university.” At that moment, I understood the apprehensive glare he wore on his face as he entered the room earlier that day. Further, I reflected upon his relaxed nature within the collaborative group setting as he discussed the Wordle. Had we already identified a way of learning that might work for Brian? I reassured him by

1 All student names in the manuscript are pseudonyms.
saying, “Brian, thank you for letting me know about your needs. We will make sure to speak frequently about ways you learn most effectively.” Brian had no idea of my mission for the semester- to provide multimodal literacy learning opportunities for all of my students. I had a hunch these multimodal opportunities would offer authentic differentiation for a variety of learning differences.

**Julia’s First Day in RED 4310- “Meeting Lauren”**

The air was filled with anticipation as I eagerly awaited the arrival of students for *Reading and Learning to Read*. In addition to being the first day of class, it was also our first time together as a new cohort. The morning marked an initial step in our journey together.

One of the first students to arrive was Lauren. As she walked in, Lauren quickly scanned the room and chose a seat in the center of the classroom. She returned my smile as she assumed her position in class. I walked over to greet her and was taken aback by her self-assured smile and confident tone of her voice. Lauren looked me in the eye and was quick to respond to my introduction. Her warm response quickly sparked a conversation regarding her first day in our cohort. As I noticed other students beginning to arrive, I disengaged from our discussion to greet new arrivals.
Infused within my reading methods course are collaborative activities. On day one the focus was on building community among my students while creating an understanding of how to build a literacy foundation. As is common on the first day of class, the discussion was filled with awkward pauses while students worked to decide how much risk they would assume in sharing their thoughts with the class. I am a firm believer in wait time and noticed when a pause became extended Lauren would raise her hand to share a response. Lauren became my Awkward-Silence-go-to-Person. I could count on her to participate when others were hesitant.

After sharing information about the study of multimodal affordances within class with everyone, Lauren was the first student to express interest in being a participant. To protect her privacy, I asked if Lauren would like to step outside the class to discuss participation further. She emphatically stated we should remain where we stood. I would later learn that Lauren feared being singled out as different. In fact, she had constructed an intricate system of behavioral patterns to mask her disability in reading. What came across as confident behavior were actually attempts to appear, what she perceived, as “normal.” Our conversation about the study marked an initial step in our journey together.

Purpose
Our study is outlined comprehensively in the Prezi link provided (Multimodal Literacies for Pre-service Teachers with Reading Disabilities: http://prezi.com/6heqru2wsfar/?utm_campaign=share&utm_medium=copy&rc=ex0share). The primary goal of our study was to explore the implications of multimodal literacy practices within the context of a teacher education methods courses for pre-service teachers with self-identified reading difficulties. For the purpose of this study we defined reading difficulty as struggling to read text due to fluency and/or comprehension, as experienced and reported by the participating students. The construct of self-identification was not verified with any written IEP, or accommodation documents. It is, however, consistent with a volunteer-based study, and perhaps less invasive than “proving” one’s status (Creswell, 2012). We explored connections between multimodal literacy accommodations and the students’ self- efficacy as future reading teachers. The goals of the study were in fact highly related to and situated within the volunteers we garnered.

Questions used to guide our inquiry include:

1) In what ways do pre-service teachers with self-identified reading difficulties perceive multimodal experiences within a reading methods course as providing affordances for their learning needs?
2) In what ways do pre-service teachers with self-identified reading difficulties perceive their self-efficacy as future reading teachers after participation in a reading methods course with embedded multimodal experiences?

**Theoretical Framework**

The theoretical framework for our study resides in the body of research regarding pre-service teacher self-efficacy (Armor et al., 1976; Plourde, 2002), social semiotic theory (Halliday & Hasan, 1985), multiliteracies (New London Group, 1996; Anstey & Bull, 2006; Mills, 2010), multimodal literacies (Cope & Kalantzis, 2009; Jewitt, 2007; Kress & Van Leeuwen, 1996), and multimodal literacies situated within a social context (Wolfe & Flewitt, 2010; Lankshear & Knobel, 2007; Gee, 1996; 2000) as a source of access for preservice teachers who are faced with reading challenges. In the following sections, we provide an overview of relevant fields in order to provide a backdrop for our study.

**Teacher Self-Efficacy.** Self-efficacy is defined as “beliefs in one’s capabilities to organize and execute the courses of action required to produce given attainments” (Bandura, 1997, p.3). In order to specify a condition specific to teachers, self-efficacy is further defined as teacher self-efficacy, which is a belief in one’s capability to teach effectively (Armor et al. 1976;
Leader-Janssen & Rankin-Erickson, 2013; Plourde, 2002). The study of teacher self-efficacy is relevant because research indicates higher teacher efficacy has a demonstrated relationship to increased annual achievement for students (Allinder, 1995); a correlation with positive teacher practices and policies utilized within the classroom (Guskey, 1988); and a correlation with innovative classroom techniques and student achievement (Haverback & Parault, 2011; Gibson & Dembo, 1984; Wolters & Daugherty, 2007). All of these findings related to teacher self-efficacy are important factors in understanding how to ultimately increase student achievement. Washburn and colleagues (2011) emphasize many preservice teachers enter the field with a lack of explicit knowledge of language constructs. This is an important consideration for pre-service teachers who have reading difficulties. An area of exploration lies within how increased levels of teacher self-efficacy, might influence pre-service teachers with reading difficulties in their practice.

**Social Semiotic Theory.** A socio-semiotic approach of multimodality defines modes as what a community decides to use as a mode (Kress, 2010; Selman, 2014). Essentially, if a person or community views something as able to communicate meaning, then it meets the criteria as a unit capable of expression and representation. However, the adopted mode needs to be evident in consistent use by the community and demonstrate its affordances for
conveying meaning to audience (Rowsell, 2013). It is important to note within a socio-semiotic modal theory anything can potentially be a mode and named a mode. However, the mode must be a socially and culturally instantiated and shaped resource for making meaning (Bezemer & Kress, 2008).

Multimodal Perspectives. Underlying the theory of multiliteracies as first proposed by the New London Group (1996) is the idea that being multiliterate is to be “socially and cognitively literate with all modes of communication” (Anstey & Bull, 2006, p. 23). The exponential development of new communication technologies drives the need for learners to be able to create meaning in increasingly multimodal ways- a component of the theory of multiliteracies (Cope & Kalantzis, 2000). Kress and Van Leeuwen (2001) define multimodality as “the use of several semiotic modes in the design of a semiotic product or event, together with the particular way in which these modes are combined” (p. 20). Essentially, the term “multimodal” is the means in which written linguistic modes of meaning are fundamental elements of visual, audio, and spatial patterns of meaning (Cope & Kalantzis, 2000). Meaning is created in many modes and made differently in each of the modes incorporated into text (Kress, 2008; Jewitt, 2012; Kress, 2014), but linked in their focus on the event at hand. This idea is particularly intriguing when
evaluating the types of accommodations preservice teachers with reading difficulties are provided at the university level.

A traditional, verbo-centric view of literacy is focused on the alphabet, on its use in print, and comprehension of the print in a linear sequence, with the realization of meaning gradually occurring inside the mind. In contrast, and in synchrony, multiliteracy attributes additional potential for meaning making embedded in multimodal text and within performances related to the texts (Bomer, 2008). A multimodal perspective of textuality, “attends to linguistic (language based) resources (speech and writing) as a part of a multimodal ensemble in which resources are organized, designed and orchestrated to realize curriculum knowledge and pedagogic relations” (Jewitt, 2007, p. 276).

While multimodality does not always encompass the use of digital technologies, digital technologies provide an avenue for “modes to be configured, circulated, and recycled in different ways” (Jewitt, 2009, p. 1). Thus, digital platforms potentially intensify multimodal possibilities (Lotherington & Jenson, 2011). Within society, adults and children alike are immersed in the use of digital technologies while they are connected to digital devices for information gathering and communicative purposes. For instance, commuters speak into cellular devices to activate Internet radio, engage in an Internet search, or convey text messages, or utilize hands-free cellular telephones.
Children interact with smartphones through gaming applications and various interactive communicative platforms, creating a plethora of opportunities for making meaning within a globalized context. These scenarios, along with countless digitally-mediated experiences, directly “insert individual(s) into a digitally-mediated multimodal world, creating new schema for participation and meaning-making” (Lotherington and Jenson, 2011, p. 227).

**Affordances of Multimodal Texts**

Use of multimodal texts create “value added” literacy opportunities (O’Brien & Voss, 2011). Multiple semiotic modes open and extend interaction with meaning-making signs. Each mode of meaning making affords its users the benefit of representing specific items in unique but complementary. These items can include actions and events or aesthetic thoughts (Kress, 2008). The affordances of new digital forms of media have revolutionized literacy practices. New conventions in the use of orthography and discourse proliferate with the emergence of dynamic communicative platforms. Individuals engage in more collaborative remixing of information rather than focusing on individual constructions of meaning. Genres, such as gaming, have become platforms for complex literacy-related practices (Kress, 2009). Given this reality, it is important to consider how interactive, screen-based media provide avenues
that extend the traditional, linear characteristics of alphabetic writing so commonplace in traditional academic settings (Kress, 2009).

Digital text is an example of multimodal system with multiple literacy opportunities. The use of printed text, audio recordings, graphics, and video recordings offer numerous modes for making meaning. “Digital affordances blur the lines between the processing of text (reading) and the production of text (writing); the two processes in interactive, multimodal spaces become virtually inseparable” (O’Brien & Voss, 2011, p. 76). A multimodal approach allows the participant to stand outside of speech or writing to get a new view, as if from a satellite (Kress, 2008).

Web 2.0 tools offer learners active participation with web-based representations, including digital text. Pre-service teachers who were previously unmotivated to write, may be more motivated to respond to a blog related to their interest (e.g., teaching websites, Pinterest. Micro-blogging) (Hundley & Holbrook, 2013). Online digital media offers the affordances of participatory culture (Jenkins et al., 2006). See Figure 4 for a model of characteristics of participatory learning as described by the New Media Literacies Project (https://playnml.wikispaces.com/PLAY!+Framework). Online tools, including blogs, wikis, podcasts, micro blogs, and games, “facilitate collaborative and socially connected online literacy practices in which users co-construct the
information space” (Mills & Chandra, 2011, p. 36). See the Prezi link for further explanation of the affordances of participatory culture (Jenkins et al., 2006) (Media Literacies Final: http://prezi.com/or6ff3zyg9y/?utm_campaign=share&utm_medium=copy&rc =ex0share).

Figure 4. Retrieved from https://playnml.wikispaces.com/PLAY!+Framework

**What Do Multimodal Experiences Inside a Reading Methods Course Look Like?**

From our perspective, students are provided additional learning affordances, through semiotic opportunities while engaged with a variety of modes. Individuals work within a variety of modes while engaged with digital
technologies, within social interaction, through dance or drama, and across different semiotic platforms. It is through the affordances of multimodal experiences in which potentially marginalized students may experience a new feeling of empowerment in a previously disenfranchising learning context and find avenues for success within the dynamic culture of the 21st century.

Multimodal experiences for our pre-service students began the very first day of class. These multimodal experiences were largely based on students’ use of digital media platforms. Our classrooms were hardwired to access and present digital media. Students were able to bring and use electronic devices to access the free campus-wide Wi-Fi. We adopted an interactive approach to our course, where we utilized tools like Glogster (www.glogster.com/) (see Figure 5), Animoto (www.animoto.com/), and Prezi (www.prezi.com/) to create interactive, meaningful presentations, which engaged multiple senses. An example of an interactive, multimodal course presentation is outlined in the provided Prezi link (RED 4310 Fluency: http://prezi.com/g04qb7llr8ry/?utm_campaign=share&utm_medium=copy&rc=ex0share). Further, we incorporated opportunities for students to move around the room and interact and collaborate with one another while working on class assignments and projects using the multimodal, digitized platforms. The purpose behind these activities was to create social engagement and
collaboration, while allowing room for student choice in how they could most successfully express their new understandings. We strove toward utilizing a harmonious blend of digital technologies, social-semiotic experiences, and student modal choices within digital platforms in order to provide expanded affordances for our learners within the courses.

Figure 5.

Outside of class, students were asked to micro-blog through Edmodo (www.edmodo.com/). As instructors, we would pose thoughts or wonderings to our students throughout the weeks. For example, one week we posted “How are you seeing comprehension strategies implemented by your collaborating teacher in your field experience?”. Many students extended the conversation
we started with thoughtful responses. In response to the previous example, one student wrote “I see my CT using turn and talks when she asks students to make text-to-self and text-to-world connections. This helps the students comprehend their reading and make connections to their own life”. Interestingly, others started new thoughts based on course experiences, readings from their text, or application to their fieldwork. The purpose behind the Edmodo blogs was to allow open dialogue about reading content between students and instructors in a relaxed, collaborative virtual space.

Further, we created digitally-based, multimodal opportunities for assessment of course content. Students were afforded choices when completing required course assessments (see example: http://animoto.com/play/O9c2xA6Yapr9JobdGnla4g). One quiz tasked students to create Glogsters in order to represent their understanding of fluency, vocabulary, and comprehension (see example RED Phonics: http://darianrivera.edu.glogster.com/quiz-2/). In the quiz Glogsters, students could provide visual representations, videos, text, movies, and audio in order to convey their ideas. In one participant’s Glog about the foundational pillars of literacy, she incorporated a video discussion about comprehension from a literacy expert, images of word study activities, a video of a child engaged in repeated reading for a fluency strategy demonstration, and text boxes with
associated images to demonstrate the differences between phonics and phonemic awareness. Additionally, students shared their creations with partners and offered reflections on the quiz experiences. Through this process, students were able to construct information about new concepts through a variety of modes, and likewise, students were able to represent their new constructions of meaning using their modal preferences.

In reviewing what we have described as “multimodal,” one may be resigned to say, “That’s just good teaching. Where’s the multimodal?” Our intent here is to point out there has always been multimodality in teaching literacy. After all, picture books are the first teaching texts. But, in the past these more visually oriented or performative gestural elaborations were executed in the service of print literacy. Newer, multimodal accounts place value on these “elaborations” as literacies. With the addition of computer-based, Web 2.0 authoring tools, the elaboration has become the text.

**Methodology**

In order to explore the phenomenon of pre-service teachers with self-identified reading difficulties and their participation in a reading methods course with infused, selected multimodal experiences, we subscribed to a qualitative case study approach (Moustakas, 1984; Yin 1984). Our constructivist assumptions guide our belief that learning is socially situated,
which is supported by phenomenological analysis tools within the case study approach. Undergirding phenomenology is the notion that individuals’ perspectives of lived experiences evolve over time as people interact with their environment and social contexts (Husserl, 1970; Purcell-Gates, 2004). While we worked within a case study design, phenomenological analysis tools allowed us to continually consider the notion that environments and contexts are continuously changing within a given lifeworld (Husserl, 1970), and each individual’s perception of a given experience is entirely unique.

Further, we define our study as a case study because we sought to provide a contextual description of a group of pre-service teachers with reading difficulties engaged in multimodal literacy coursework. Yin (1984) defines the case study research methodology as “an empirical inquiry that investigates a contemporary phenomenon within its real-life context; when the boundaries between phenomenon and context are not clearly evident; and in which multiple sources of evidence are used” (p. 23). Understanding the shared experience through the participants’ perspectives through phenomenological analysis tools allowed for a more comprehensive understanding of the experience. We looked toward descriptive data to provide insight into the lived experiences of our students who participated in our coursework, while also keeping our role as instructors in the forefront of
our minds. Vivid descriptions provided through our interview process, participant observations, conversation calendars, and Edmodo micro-blogs enabled us to gain insight into the “essence of the experience” (Van Manen, 1990, p. 38) within our multimodal reading course. We attended to procedural activities suggested by Van Manen (p. 39), which included:

1. Turn to a phenomenon which seriously interests us and commits us to the world.
2. Investigate experience as we live it rather than as we conceptualize it.
3. Reflect on the essential themes, which characterize the phenomenon.
4. Describe the phenomenon through the art of writing and re-writing.

Participants

Our volunteer participants included six students with self-identified reading difficulties enrolled in the College of Education at a large, southeastern university. The participants were part of a field-based cohort model. Two of the authors independently taught reading methods courses in separate cohorts from which the participants were drawn. Recruitment was based on self-identification of reading difficulty, enrollment in a section of our foundational reading methods course within the College of Education, and a voluntary desire to participate. We explained the premise of our study during the initial course meeting, soliciting participation among students who identified with the
aforementioned description. There was no attempt made to verify the students’ self-assessments, but the types of difficulties included (in students’ words):

**Daniela**: “The difficulty I had in school with reading was my inability to pronounce words; my lack of phonics knowledge. At times I also see letters, words, and numbers in the wrong order.”

**Amy**: “I know I have to work a lot harder than those around me when it comes to reading. I remember working hard to sound out words, and I always struggled when it came to reading aloud.”

**Lauren**: “Reading and spelling has been a huge struggle for me since Kindergarten. After I was held back in 1st grade I was tested and diagnosed with dyslexia.”

**Brian**: “I have a processing disorder that I’ve struggled with as long as I remember. My mom actually went into special education to learn more about my struggles.”

**Kim**: “In school I had extra time on tests and extra help. I really needed the extra time to make sure of everything.”

**Meg**: “I have always struggled with reading. In elementary school, I was always in the lowest reading group. The school pulled me out for special reading instruction.”

In all, we came to know our participants as a diverse group of learners with felt difficulties in their experiences as readers within educational settings.

**Data Collection**
Qualitative data included pre- and post-interviews, participant observations, conversation calendars, and Edmodo posts. Each of these data is described in this section. These qualitative methods of gathering data provided an effective means of bringing to the foreground the experiences and perceptions of the participants from their own perspectives. We scheduled audio-recorded pre-interviews with our participants during the initial weeks of the semester. This semi-structured interview provided a guide for conversation with our participants. Examples of questions included: How would you describe your educational experiences at the university level? What do you see as some of your strengths in becoming a reading teacher? During this interview, we hoped to gain initial insight into the literacy experience our participants had prior to experiences within our course. At the culmination of our course, we conducted audio-recorded post-interviews. The intent of this semi-structured interview was to gain insight into the experiences and perceptions of our participants while engaged in literacy coursework. Examples of questions included: How would you describe your experience in RED 4310? How did your multimodal experiences help you as a learner? How did they help you as a reading teacher? See the Glogster example with embedded interviews in the link provided (Brian- A Multimodal Snapshot: http://william1.edu.glogster.com/brians-glog/).
In addition to interviews, our participants provided weekly responses (N= 13 weeks) as part of their course requirement. These weekly responses were recorded in conversation calendars, which served as weekly communication folders between the instructors and participants. All students participating in the course offered reflections after each session. Many students utilized the conversation calendar space as an opportunity to discuss new understandings from course discussions, anxieties about upcoming assignments, or general questions and comments for us, as the course instructors. Further, data were collected as artifacts from the participants’ use of multimodal participation outside of class through the use of Edmodo (http://www.edmodo.com/). Edmodo is a social network for students and teachers who share common experiences within their educational experiences (see example in Figure 6). Jenkins (2006) described how social networking opportunities provide a “participatory culture” where communication and collaboration about shared ideas allow learners opportunities to consume information and produce meaningful new content. In our case, all of our participants utilized Edmodo as a tool for communicating with classmates about their new understandings of reading content presented in class, relaying experiences with reading inside of the field placements, and interacting with classmates and instructors about course assignments. Information from this site
was collected and coded for underlying themes. This is described in further
detail in the data analysis section.

**Figure 6.**

Throughout the data collection process, we engaged in data collection
as participant observers. Our observations were documented in researcher
journals, allowing us, as the researchers, to share our observations with each
other in order to gain more holistic understandings about the lived experiences
of our students and ourselves while we participated in the course. We chose to
focus observations on participant interaction with multimodal text and
communicated weekly regarding our observations and researcher-reflexive
journals.

**Data Analysis**

In order to gain further understanding into our pre-service teachers’
conceptualizations about accommodations they received for their reading difficulties before and after participation in our course, we subscribed to Moustakas’ (1984) method of phenomenological reduction. While we describe our study as a qualitative case study, phenomenological analysis tools allowed us to preserve the participants perceptions of their experiences as they shared their personal accounts of reading difficulties and their individual and shared experiences with multimodal literacy coursework. Before immersing ourselves in the data, we bracketed our preconceived notions in order to focus solely on our topic and questions. During the bracketing process, we suspended, as much as possible, our preconceived notions of our participants’ experiences based on our own experiences as literacy educators. In turn, we used the matrices of our participants’ world-views in order to understand the individualized meanings of what each participant perceived about the phenomenon. Based on transcriptions of our pre- and post-interviews from audio recordings, we looked at the data from a lens of “horizontalization” (p. 97). Horizontalization refers to the act of regarding every piece of data (statements) as meaningful, and looking for similar or connected bits of data, all on the same level of importance. Throughout this process we continually looked for emerging themes by reading and rereading the transcriptions. Consistent patterns were established for data as we read through data, and
collectively, we looked across the patterns to determine themes based on patterns within the data. Moustakas’ method enabled us to provide a rich, textural description of the participants’ experiences while keeping the essence of each individual’s experience in tact.

Similarly, we looked across posts our participants had offered through their weekly conversation calendars and Edmodo posts. These data pieces were also arranged into horizons and patterns were established similar to the aforementioned interview process. Based on the nature of the data sources, we noticed further patterns in need of validation and elaboration, based on additional examples, or elimination, along with the emergence of new themes. From this process, we began the development of a composite depiction (Moustakas, 1984), which depicted the phenomenon as experienced by the individuals and as the group as a whole by preserving vivid, accurate, and clear depictions of participants’ experiences. We read and reread participants’ reflections as we engaged in this horizontal categorization processes, keeping the notion of phenomenological reduction, eliminating what we thought participants would not have recognized.

Finally, we developed a creative synthesis (Moustakas, 1984) of the participants’ experiences. Moustakas suggests the creative synthesis offers a wide range of freedom in characterizing participants’ lived experiences.
Therefore, in our discussion, we offer ways of characterizing the semiotic experiences afforded through multimodal learning experiences for our participants with reading difficulties.

**Findings: The “Lived Experiences of Our Participants”**

*Julia (Instructor): “How do you perceive literacy accommodations after your multimodal experiences in RED 4310?”*

*Lauren (Participant): “It’s funny you said accommodations. I didn’t think of accommodations because it (multimodal instruction) just seemed like the right thing to do... It (multimodal instruction) really got me through the course and helped me to stay on task and look back on things... It was almost like a map or guide. You helping me, helped me to help myself later.”*

In order to examine our research questions, we looked across pre- and post interviews, Edmodo posts, and conversation calendars in order to identify reoccurring responses among our participants. First, we considered how pre-service teachers with self-identified reading difficulties perceived multimodal experiences within a reading methods course as providing affordances for their learning needs. As we looked across post-interviews, we noted all participants described the course as an engaging experience. When we asked participants, “What multimodal literacy accommodations did you receive in this course? How were they beneficial or not beneficial?” Participants’ responses offered
Insight into their perceptions of what constituted accommodations. Participants included details about levels of engagement they experienced within the coursework, the compelling nature of visual imagery, the use of alternative quiz formats, and the enhancement of instruction based on the integrated use of technology and other multimodal textual sources. One student explained during a weekly Edmodo post, “I really enjoyed the group work we did which helped us to both get to know our peers and get the chance to share our perspective of the readings as well as hear the views of others”. This emphasized the level of engagement she experienced during collaborative activities within the course. Another participant noted, “I liked the way you did the lessons because there were visuals I could attach to my memory... I could focus on the visuals, even if I zoned out. Then, I could go back and pick up right where you left off... It helped me have a clear picture so I could understand the content.” This participant highlighted how the integrated use of technology and multimodal resources aided in content retention and comprehension. These quotes underscore how participants perceived the use of visuals and various multimodal texts during presentations, collaborative group work, and access to presentations after class meetings provided affordances for learning course content, thus accommodations for their learning needs. See the YouTube video for examples of our participants’ perceptions of their
experiences while participating in multimodal coursework (Multimodal Affordances: https://youtu.be/CWalfn32Nyo).

Participants also documented their perceptions of multimodal quiz experiences. One participant stated, “I liked doing multimodal quizzes a lot. They helped me to focus on how to get the content correct instead of worrying about time. I learned more through doing them than if I had to take a traditional test”. Another participant stated, “I felt like the quizzes were helpful because I had to go back into the content and learn more. . . It helped me to go back and find visuals for the content. I am very visual.” When considering participants’ perceptions of accommodations they received through the course experience, it became clear through the participants’ comments, they viewed multimodal quiz experiences as providing affordances for their learning, and again, accommodations for their learning needs.

When considering our second research question, we sought to gain insight into the ways pre-service teachers with self-identified reading difficulties perceive their self-efficacies as reading teachers after participation in a reading methods course with embedded multimodal experiences. We continued the reading and rereading of our pre- and post-interviews, Edmodo posts, and conversation calendars. During the pre-interviews, participants reported fears of reading aloud and struggles with fluency and decoding skills. All of the
participants perceived these struggles to be potential barriers to their effectiveness as reading teachers. During the pre-interview, we asked the participants, “What do you see as some of your challenges in becoming a reading teacher?” One student responded by stating, “I still have a hard time with reading fluency. I guess I just have to take extra care and practice before class. I have to make sure I am confident before I teach the class”. Another student responded by stating, “I’m afraid of making the same mistakes they (my students) are making. I am studying what I am teaching them… My weakness is relearning and understanding this stuff to the point I can teach them”. These quotes demonstrate the emotions students felt as they entered our reading course.

During our post course interview, we asked participants questions regarding their strengths and challenges in teaching reading. A student reported a perceived teaching strength to be his understanding of how visuals can provide affordances for learners. He states, “I need to incorporate more things that are visual, so that people who think like me have something to focus on. It (multimodal instruction) made me realize that I need to approach all students, regardless of how they learn, through a lesson that incorporates all their learning styles”. Further, another participant stated, “I think it (multimodal experiences) helped me because it gave me ideas on
how to use it in a classroom... I don’t even think they (teachers) used
PowerPoints until I was further along in high school... now, it’s so different”.
As we continued discussions about strengths and weaknesses with our
participants, we noticed shifts in how participants viewed their own abilities
and associated challenges in teaching reading. In pre-interviews, we noted
students expressing concerns about fluency, decoding, and basic command of
language. During the post-interviews, participants’ conceptualizations of their
challenges shifted. This is highlighted when one participant stated, “I feel that I
really understand everything. I feel like I could go into any classroom and
teach kids who do not know how to read. I did not feel that way at all before
coming into your class.” Another participant discusses how it is important to
“understand what students are going through” . . . You have to work with
students and use their strengths, rather than point out their weaknesses.”

Some of our participants revealed how they continued to struggle with
fluency and decoding, however, they demonstrated how they have developed
personalized strategies for coping with their fears. One student stated, “I have
to have experience with a text before I use it in a lesson. That means, I need a
lot of planning time. Really, I think this will be one of my strengths. I will be
stronger because I will be more thoughtfully planned”. Another participant
underscored this idea when she discussed how she would “learn alongside”
her students. She revealed how she was practicing her decoding abilities prior
to teaching her students. She discussed how this gave her an “insider’s
perspective” as she presented new concepts. In essence, the recognition of the
initial felt difficulties with reading resulted in participants developing
individualized compensatory skills in order to feel confident in their literacy
teaching abilities. The recognition of strategies they plan on incorporating in
their practice emphasizes how participants began to shift away from feeling
disempowered because of their difficulties to using their new understanding of
their abilities as an avenue for successful literacy teaching.

**Discussion: Multimodalities as a Source of Empowerment and
Semiotic Potential**

Choosing to learn. Through the analysis of our participants’ pre- and
post-interviews, Edmodo posts, and conversation calendars, we discovered
overarching themes. The first theme that emerged highlights participants’
feelings of empowerment in their teaching and learning through choice and
control involved in multimodal learning experiences. Choice can be defined as
the participants’ freedom to choose the types of texts and applications, which
afforded optimal learning experiences. This moves beyond the notion of simply
copying and importing images into a Glogster or Prezi in order to regurgitate
“facts” from course texts. Choice involves the act of participants seeking out
examples to demonstrate constructions of knowledge, based on new understandings from collaborative discussions, readings, and social networking opportunities (Edmodo). Control can be defined as the way participants perceived their abilities to navigate through online resources, both individually and collaboratively, and select multimodal texts in order to convey their understandings. Of course, both of these themes are within an instructor-controlled course. However, we maintain the extra choice the students did enjoy through multimodality made a difference.

Lankshear and Knobel (2007) discuss “new technological stuff” and “new ethos stuff” as they elaborate on new literacies. In this discussion, Lankshear and Knobel describe how “new technological stuff” can provide tools for consumption and production during the learning process, while “new ethos stuff” potentially takes the learning process a step further. In essence, they highlight how the notion of “new ethos stuff” emphasizes the participatory and transformational nature of learning in the 21st century. It is through participation in cultural contexts (both online and offline) that allows for construction, production, and dynamic transformation of collective new meanings.

Our course was designed to encourage participation in collaborative consumption of available literacy pedagogical and content information and
production of innovative constructions of new meanings. Students consistently engaged in evolving course opportunities where their work was shared, discussed, and revised, reflecting new understandings based on collective experiences. In this learning environment, it can be argued our participants with self-identified reading difficulties found accessible learning opportunities through choice and control while navigating through collective and personalized learning spaces, therefore, creating learners who felt empowered thorough a multimodal learning process.

Connecting through Multimodality. Another overarching theme that emerged was our participants’ perceived strength in the semiotic potential of multimodal learning. As aforementioned, participants reported feelings of “connectedness” with content and “deeper” understanding and engagement when immersed in multimodal experiences inside and outside of the course. All of our participants reported some struggle with traditional print-based practices within the scope of their educational experiences. Interestingly, the participants all revealed through our interview sessions ways in which they “connected” with course content, whereas, before our course, they experienced hardships in feeling connected with other university-based course content. Some participants reported the act of selecting visual images to represent their learning from discussion and reading to place them in a position in which they
had not been traditionally familiar—a position of power. Participants described the power of selecting from optional textual representations within course presentations and discussions in which they found a safe place for learning, and they also cited their experiences with alternative quiz formats and social media interactions. They were able to convey their “connectedness” to course content successfully through the affordances of the descriptive nature of visual representations, the interactive nature of course delivery, and the safety of finding “places” where they could feel comfortable in their learning. Further, most of the participants described ways in which they went “deeper” in their learning.

The act of switching back and forth between modes enabled these traditionally marginalized learners to make connections within and between modes, and ultimately, provide a platform for “deeper” understanding to occur. Without the affordances provided within and between the modes, it could be argued that these learners would still be placed in a marginalized position. This was highlighted through participants’ reported feelings during alternative quiz formats. One student emphasized this theme as he stated, “This is so different than taking a bubble-in test, or even an essay test. I feel like I can read a passage from our textbook and then explore what I’m learning even more. I can find a video to embed in my Glogster that lets you (the instructor)
know exactly how I see it in my mind.” He went on to say, “I know I’m not the
greatest writer, but I feel like I am great at making a Glog. It allows me to use
a lot of different tools to show off what I know. I also think I’m learning a
whole lot more because I’m able to explore.”

Limitations

In retrospect, we sought to look at the affordances of multimodality for
participants with self-identified reading disabilities, however a dissonance exists
between our research purpose and methodologies. For instance, while created
an environment where we privileged digitally-based, multimodal expression
within the context of our course, we utilized print-based transcriptions of
interviews, print-based expressions of participants’ reflections from social-media
platforms, and observational notes as our primary data for analysis. Further
analysis is needed of the digitally-based, multimodal artifacts participants’
created in order to fully support our beliefs that digitally-based multimodal
experiences offered affordances for participants’ meaning-making within the
context of the course. Therefore, while we were able to convey students’
perceptions of the course experience through print-based means, it is
imperative to consider and adequately analyze multimodal forms of
representations in order to gain more holistic understanding of meaning-making
experiences through multimodality, especially when seeking to make
generalizations. An example of how we might use multimodal data analysis techniques in order to reconsider the meaning of our data is provided in Figure 7.
References


contemporary communication. New York: Oxford University Press.


Appendix A

Table 1
Analysis of Group Means

<table>
<thead>
<tr>
<th>Category</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading Motivation (pre)</td>
<td>21.50</td>
</tr>
<tr>
<td>Reading Motivation (post)</td>
<td>28.83</td>
</tr>
<tr>
<td>Reading Assessment (pre)</td>
<td>28.83</td>
</tr>
<tr>
<td>Reading Assessment (post)</td>
<td>44.83</td>
</tr>
</tbody>
</table>

Reading Teacher Sense of Efficacy Scale

Directions: This questionnaire is designed to help us gain a better understanding of the kinds of things that create difficulties for teachers in their school activities. Please indicate your opinion about each of the statements below. Your answers are confidential.

<table>
<thead>
<tr>
<th></th>
<th>Nothing</th>
<th>Very Little</th>
<th>Some Influence</th>
<th>Quite a bit</th>
<th>A great deal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How much can you do to help your students think critically while reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>2. How much can you do to motivate students who show low interest in reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>3. How much can you do to get students to believe they can do well in reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>4. How well can you respond to difficult questions from your students about reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>5. How much can you do to help your students value reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>6. How much can you do to gauge student comprehension of reading skills you have taught?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>7. To what extent can you craft good reading questions for your students?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>8. How much can you foster student creativity while reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>9. How much can you do to improve the understanding of a student who is failing reading?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
<tr>
<td>10. How much can you do to adjust your reading lessons to the proper level for individual students?</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
<td>(4)</td>
<td>(5)</td>
</tr>
</tbody>
</table>

Note. Adapted from Tschanzen Moun, M and Woolfolk Hoy, A (2001).

From Haverback & Parault, (2011)
Appendix B

Pre-course Interview Questions

1) How would you describe your educational experiences at the university level?

2) What types of accommodations have you received?

3) How have the accommodations been helpful or not helpful?

4) What do you see as some of your strengths in becoming a reading teacher?

5) What do you see as some of your challenges in becoming a reading teacher?
Appendix C

Post-course Interview Questions

1) How would you describe your experience in RED 4310?

2) What multimodal literacy accommodations did you receive in this course?
   a. How were they beneficial or not beneficial?

3) How did your multimodal experiences help you as a learner? How did they help
   you as a reading teacher?

4) What do you see as some of your strengths in becoming a reading teacher?

5) What do you see as some of your challenges in becoming a reading teacher?

6) Is there anything else you would like to add? Do you have any questions or
   comments?
Appendix D

RTSES Questions Used for Reading Motivation:

2) How much can you do to motivate students who show low interest in reading?
3) How much can you do to get students to believe they can do well in reading?
5) How much can you do to help your students value reading?
8) How much can you foster student creativity while reading?

RTSES Questions Used for Reading Assessment:

7) To what extent can you craft good reading questions for your students?
10) How much can you do to adjust your reading lessons to the proper level for individual students?
11) How much can you use a variety of reading assessment strategies?
12) To what extent can you provide an alternative explanation or example when students are confused about reading?
14) How well can you implement alternative reading strategies in your classroom?
15) How well can you provide appropriate challenges for very capable readers?
Linguistic landscapes and the navigation of new cities:
A phenomenological self-study of what Jim King taught me

by

Lindsay Persohn

Lindsay was Jim’s doctoral student and colleague at the University of South Florida.
Abstract

Landry and Bourhis are credited with coining the term *linguistic landscapes*, which they defined as “the language of public road signs, advertising billboards, street names, place names, commercial shop signs, and public signs on government buildings [combined] to form the linguistic landscape”. Based on a broad study of linguistics through a college course with Jim King and a shared love of travel, I took a phenomenological approach to this self-study as I explored the linguistic landscapes of three unfamiliar countries. I analyzed the photographic data I collected to understand what information I gained from the signs and how I used the information to meet my needs. I believe this kind of data could influence visual literacy research and instruction in a way that may help tie in-school teaching to an enriching life outside of school.
"Travel is fatal to prejudice, bigotry, and narrow-mindedness, and many of our people need it sorely on these accounts."

-Mark Twain, Innocents Abroad

Landry and Bourhis (1997) are credited with coining the term *linguistic landscapes*, a term which they defined as “the language of public road signs, advertising billboards, street names, place names, commercial shop signs, and public signs on government buildings [combined] to form the linguistic landscape of a given territory, region, or urban agglomeration” (p. 25). The “linguistic landscape serves to inform in-group and out-group members of the linguistic characteristics, territorial limits, and the language boundaries of the region they have entered” (Landry & Bourhis, 1997, p. 25). Public signs reflect the language of power in a region and can convey linguistic identities and the status of competing language groups (Bourhis, 1992, as cited in Landry & Bourhis, 1997).

I explored the linguistic landscapes of three unfamiliar countries during a forty-five day summer research and leisure trip. I took a phenomenological approach to this study (Patton, 1990) to gain a holistic and inductive understanding of the information I gained from the signs in these cities. As this was my first time out of the United States, I had a heightened awareness of the signs around me and their physical contexts because I had to meet my basic needs for food, transit, and activity in these foreign settings. I photographed the signs and symbols around me that I
utilized in order to meet these needs. I considered how the linguistic landscapes I saw in my travels influenced my perception of each place. When I returned home, I analyzed the photographic data for patterns, commonalities, and dissimilarities to begin to understand what information I gained from the signs, how I used the information in visual images to meet my needs, and what skills I used to acquire this information.

My interest in this study was sparked by my first travel experience abroad and my attention to the kinds of skills I needed in order to make my trip safe and productive. My knowledge of linguistic landscapes came after a course in linguistics with the world-traveler, Jim King. Through these contexts and conversations, I began to see signage in foreign cultures as a tool for cross-cultural navigation and understanding other ways of living. This knowledge could help teachers better prepare their students to navigate the linguistic landscapes of foreign cultures, making international travel a conceivable option for students while developing visual intelligence, which has been said to increase “the effect of human intelligence” and “extend the creative spirit” (Dondis, 1973, p. 185).

**A Brief Review of the Literature**

I reviewed the literature and conducted this study with an eye for my own reading of the signs of England, Finland, and France in my first trip abroad as a visitor and education researcher. I reviewed the most current literature in the field of linguistic landscapes and I used commonalities in those reference lists to identify the foundational work in the field. A basic search of the key term *linguistic landscapes* in
peer-reviewed journals through Publisher Provided Full Text Searching File, Academic Search Premier, MLA International Bibliography, OmniFile Full Text Mega, Arts & Humanities Citation Index, Social Sciences Citation Index, Communications Abstracts, and ScienceDirect yielded 72 results. Of those, I identified six published works that were within the scope of this review, peer-reviewed, and available to me. From those articles, I incorporated six additional works cited across many or all of those articles in the form of book chapters and seminal works of any publication date that further informed my understanding of the field.

I found that studies were only conducted from an outsider perspective. No one examined their native linguistic landscape. I initially questioned this commonality, wondering why all researchers examined languages and cultures other than their own and why I, too, only considered studying other linguistic landscapes. de Botton (2002) provides insight, noting that linguistic landscapes do not seem distinctive to the casual eye; they are noted when signs appear in a form that would “never exist in precisely this form in [one’s] own country” (as cited in Jaworksi, 2010, p. 9-10). The visual messages of linguistic landscapes become so much a part of the scenery of a place, making note of the message becomes an unconscious everyday activity to the insider (Sayer, 2010).

The spaces, places, topics, and lenses varied greatly among the studies I reviewed. Wetzel (2010) questioned authorship and intended audience through examination of Japanese signs as narratives. She viewed the images and text of public advertising and informational signs and found them to be useful in examining
everyday life in Japan. Sayer (2010) described the extensive use of English on signs in a community in Mexico to identify the social significance it carries within the community. He found that English was often used because it was seen as sophisticated, fashionable, cool, sexy, an expression of love, and a means to express subversive identities. Lou (2012) looked closely at the signage of Washington, D.C.’s Chinatown and how the superficial inclusion of Chinese script as per law shaped the production and consumption of this text. She found that the Chinese text was not relevant to the lives of the city’s inhabitants, as they do not engage with it on a day to day basis. Barrs (2011) studied the use of the English language in Japanese public and private signage. He encourages teachers to attend to signage in order to help students ‘unlock’ the code of English embedded in the native Katakana script. Tuñi and Blackwood (2010) examined brand names for their ties to regional and cultural heritage by questioning each brand’s authorship. They found that many brand names lost their ties to a country of origin and became multilingual brands over time through worldwide consumption. Jaworski (2010) examined postcards from around the world for the sense of place portrayed to tourists through linguistic landscapes. He looked at the interplay of text and images and how they engage the attention of viewer and portray it in a positive light to encourage travel to the destination.

Researchers addressed informational aspects of the signs they examined as necessary and tended to focus on signs for their symbolic functions, as in Lou’s (2012) study of Washington D.C.’s Chinatown, Wentzel’s (2010) study of Japanese signs as narrative, or Sayer’s (2010) study of English in Mexico. They investigated linguistic
landscapes that were largely defined by their symbolic functions in discourses of power and cultural identity. Informational functions may include basic communication and the obtainment of services. The main focus of Jaworski’s (2010) work could be interpreted as informational, as he analyzed post cards for their sense of place.

Lou (2012) builds a detailed triadic model of place, consisting of spatial representation, material space, and spatial practice. Lou’s model proved useful in my analysis of the informational functions of linguistic landscapes I observed. Lou sees the study of linguistic landscapes as a spatial representation on the surface of a place; an explicit lens for interpretation of signs that incorporates language as semiotics, language as action, and language as capital. Further, Wetzel (2010) makes explicit a Bakhtinian theoretical frame for understanding linguistic landscapes, viewing advertising signs as narratives and questioning voice, authorship, and interpretation of everyday public signs in Japan.

This brief literature informed several of my decisions in my own study of linguistic landscapes and prepared me to take my own photographs of signs. The analysis of linguistic landscapes for their symbolic functions was beyond the scope of my historical and cultural understanding of the countries I visited. I focused on linguistic landscapes mainly for their informational functions, as this function mirrored my use of signs throughout my travels. The literature also brought to my attention issues regarding the unit of analysis for this study. According to Huebner (2008), the literature has yet to clearly define a unit of analysis. A ‘sign’ could be defined by its text, images, text and images, size, message, or even through its surrounding visual
context. Though most studies I reviewed set forth Landry and Bourhis’s (1997) definition of a linguistic landscape, each study proceeded to define signs differently or not at all. As I selected scenes and composed photographs as well as possible while maintaining an alertness to my surroundings, I included the contexts I thought necessary to balancing scale, detail, and content as best I could.

Huebner (2008) also raises questions of agency and intended audience, questions closely related to Landry and Bourhis’s (1997) symbolic function of signs, situations motivated by political change or political control. Often in the literature, signs are viewed as top-down (created by an authority; i.e. Government or corporation) or bottom-up (created by the community or members of the public). This way of thinking is useful theoretically but becomes less effective in practice as the system is socially constructed and can vary dependent upon point of view. It raises questions for me about my distinctions in inclusion and exclusion criteria for my photographs in this study, as I recognize that the interpretation of signs may never be purely for informational or symbolic functions, top-down or bottom-up. One function informs the other and vice versa.

Data Collection

Because this was my first travel abroad, I entered each new territory with an inexperienced view of its linguistic landscape. I took a phenomenological approach to this study (Patton, 1990) as my aim was to gain a holistic and inductive understanding of the information I gained from the signs in these cities. I documented what I saw and how I used it to find my way in new cities through photographs of
signs. Charles S. Peirce, Ferdinand de Saussure, and Roland Barthes helped me to see images, sounds, and words, as examples of signifiers (as cited in Sturken & Cartwright, 2001). The meaning of those signifiers is the signified. The signifier and signified form the ‘sign’ (Sturken & Cartwright, 2001, p. 29). My definition of ‘signs’ evolved to include visible texts and their immediate surroundings. I found that my definition of ‘texts’, though broad in the beginning, expanded throughout my journey and subsequent analysis as I considered signifiers, the signified, and the contexts of signs I discovered.

During my forty-five days in Europe, I traveled to each of my destinations for varied lengths of time. I have included a timeline of my trip, as each destination brought new challenges and new triumphs (see Figure 1).

![Figure 1. A timeline of destinations where I stayed at least overnight.](image-url)
I focused on signs for their informational value. I used the signs in my destinations to navigate cities that were completely new to me (e.g., London, Helsinki, Paris) and in some instances, the linguistic landscapes were comprised of languages that were also unfamiliar (e.g., British English, Finnish, Swedish, French). Though the implications of the symbolic discourse in each linguistic landscape were out of the scope of my study during this short trip, if the symbolic function of a sign came to my attention or raised a question in my mind, I included a photograph in the data when possible.

I took pictures of the public signage that I used to help me navigate new spaces. Naturally, I did not photograph every sign and symbol that I used to acquaint myself with new cities. I took photographs out of both necessity and practicality. I did not put myself in undue danger to take a photo by stopping in the middle of a crowded sidewalk or busy intersection. My goal was not to call attention to myself as a visitor. I took all photographs with my iPhone, as it was lightweight, portable, and less obtrusive than a separate camera. At the end of my six and a half weeks abroad, I had about 1500 photographs of sights and signs.

**Analysis**

I considered what happened during my days abroad, using the photographs as visual cues. Day-to-day activities were mainly concerned with my meeting three broad and basic needs in each unfamiliar place: food, transit, and activity. Every leg of the trip was arranged ahead of time, so finding a place to stay each night was not a concern.
Lou’s triadic model of place (material space, spatial practice, and spatial representation) helped me to understand components of each of the categories of my photos. Further, Lou integrates three perspectives in sociolinguistic research: “language as sign and semiotic system; language as action and practice; and language as resource and capital” (p. 39). After initial sorting of my photos based on the needs they helped me meet, I reexamined the photos with Lou’s frameworks in mind. Because these ideas are complex and overlapping, and because of the vast amount of visual data I had collected, it was helpful to me to compartmentalize my thinking somewhat. I made sense of the patterns in the images by forming broad categories (food, transit, and activity) in order to reflect deeply on what I saw in my photographs and how I used the information from the signs.

In examining the signs I used to meet my basic need for food, I could often situate my thoughts within Lou’s model of language as action. Meeting this need for food most often required me to interact with a vendor, waiter, or cashier. Even self-selected purchases at a market required two-way communication with a cashier with whom I may or may not have shared a spoken language. I found that in order to make decisions about my meals, I had to actively engage with the signs and people around me, weighing nutritional value, taste, and budget criteria (See Figure 2).
I found much evidence of Lou’s (2012) frame of language as a semiotic system in analyzing photos of my basic need for transit. Whether or not I understood the written language, the sign systems on public signs helped me to navigate in these new spaces. When making decisions about transit, I generally considered ease of navigation and safety. I had to understand not only where I was but how to get where I wanted to go. Travel was not only about being in an unfamiliar place but the act of navigation to get to the next unfamiliar place. Though these are complex ideas, paper and online maps helped me to decide how I would travel and made the process concrete, which, in turn helped me to negotiate the unfamiliar semiotics of the language and spatial characteristics of transit. I found that even when the language of maps and signs was not familiar to me, I relied on the how the words looked, where the sign was positioned, and cues from surrounding signifiers. Figure 3 shows a road sign in Helsinki. Though I did not heavily rely on the pronunciation or meaning...
of the words on the sign, I depended upon the way the words appeared visually and their immediate surroundings as a marker for finding the way back to my hostel.

Figure 3 - a street sign in Helsinki, Finland

Through my activities in each of these cities, from sightseeing to visiting cultural events, I gained an appreciation for the sense of place in each territory. I wanted to be able to answer the question, “What is it like there?” when I talked to my family, friends, and colleagues about the trip. I balanced my activity choices with interest and cost. Often, my activities consisted of a self-guided walking tour. Along the way, I photographed signs and sights that helped me to develop a sense of each place I visited. In my analysis, I focused on these ideas with Lou’s concept of language as resource and capital in mind. In this way, the distinct architecture of broadly defined signs (i.e. buildings, public art, traffic patterns, in addition to road signs and advertisements) in each area contributed to my development of sense of place. For
example, in Paris, while out walking, I developed a sense that it is a city that values
detail and intricacies. I photographed a lamppost on a bridge (see Figure 4).
Decorative features like these were not uncommon in Paris. I saw these ‘everyday’
works of art as cultural resource and capital in this linguistic landscape that
communicated a sense of place.

While analyzing my photographs and reflecting on the trip,
I thought about my use of literacy skills that were visible in the photographs but less
explicit (i.e., beyond the surface of the image in a photograph). I used financial
literacy skills to think differently about currency. I was reminded of this by the photos
of menus and advertisements. I also had to consider my sense of spatial awareness
and culturally literacy within these contexts.

Figure 4 - a lamppost on a bridge in Paris, France

Discussion of Findings

Meeting my basic needs of food, transit, and activity in these new territories
required knowledge of written language, images, oral language, spatial cues, and cultural gestures, among other skills. In each city I visited, at minimum, I had to make purchases at a market, occasionally ask for directions, and do something outside of my room when I had spare time.

Buying food in each of these new settings necessitated active mental engagement from me in order to weigh nutritional value and cost. In the markets where I shopped, I was required to scrutinize packaging and food labels for words and images in order to meet nutritional requirements. Shelf placement of products in markets helped me understand what might be inside the food packages I bought. Dairy products were in a refrigerated section, tea and coffee were situated in an aisle together. Though the items in the produce section were a bit easier to distinguish, I had to think of price in pounds or euros per kilograms, two systems of measurement that were not local thoughts. At restaurants or food carts, I used other-than-text signs to determine what I would have. For example, Figure 5 shows one example of a meal I ate in Cambridge, England. The term ‘pasty’ was new to me, but having the food displayed in the window along with signage describing fillings and prices, I was able to gain a sense of what the food might taste like and what kind of nutritional value it may have.

In all three countries, I used public transportation. The knowledge it takes to read a map is not the same as the knowledge it takes to find the way to a destination using public transportation. I live in a region where most people (myself included) drive their own cars. Adjusting to a lifestyle in walkable cities with reliable, useful,
and convenient public transit required me to understand maps in a different way. In past domestic travels, I was able to use an application on my phone to help me map my route. But, I did not have international phone service, so my apps were not live. I had to plan ahead and take screenshots of the maps and schedules I needed (See Figure 6).

![Figure 5 - the window of a pasty shop in Cambridge, England](image)

In England and France, I rode underground trains several times while my train in Finland only traveled above ground. In my experience in prior domestic travels, I have noted that my sense of direction is stronger if I do not have to go underground for transportation (i.e. Chicago’s elevated train system was less difficult for me to navigate than New York City’s subways on my first trips to these cities). Gaining a sense of direction after coming up from underground can be challenging in a new city and a strong sense of direction, a knowledge of the area and/or cross streets, a compass, or a map may be necessary to continue navigation. A person who uses public transportation in their home city may not find this as challenging.
When choosing an activity, I generally looked for my plans to be inexpensive and interesting to me. Though I had guide books for all of my destinations, I relied often on found advertisements for shows, events, and museums to guide my decisions for planned leisure activities. In Cambridge, I saw posters all over town for ‘The Big Weekend’. As it was free and within three minutes walking distance from my residence, I attended. I found I often did not understand the context of activities such as ‘The Big Weekend,’ perhaps because I was unfamiliar with other not-so-big weekends in Cambridge. The signs helped me understand where to go, how to dress, and how much money to take to any given activity.
Rethinking ‘Signs’ as a Sense of Place

I found my definition of ‘signs’ became broader during the collection and analysis process, as my definition of ‘texts’ expanded. I found myself taking photographs of trash bins. It was interesting to me that garbage looked quite different in different countries. I thought of garbage cans as a marker of a place. In Cambridge, trash bins were not hard to find. They were on nearly every corner. Often, after big events, the trash bins would overflow until they were emptied the next day. But, in London, there were nearly no trash bins to be found. The Olympics would be in London soon after my visit, and a conversation I had with a woman from Wales while we were waiting in line for our turn on the London Eye revealed that the city had removed most public trash cans for security reasons, as they can be easy
receptacles for bombs. People had begun making piles of garbage on the sidewalks. In Paris, I often found public trash receptacles in the form of transparent bags hanging from a large metal ring attached to a pole (see Figure 8). I wondered if this was one possible solution to London’s problem.

Figure 8 - a garbage bag in Paris, France

In Finland, I saw workers pick up trash with brooms and street sweepers. After the debris was gone, a machine washed the pavement. I took a photograph of the walkway just after the machine had cleared the area (Figure 9). It was interesting to me to see how different cities handled the universal human problem of waste disposal. During analysis of the photographs I took, I began to understand that garbage looks different in diverse environments because it contains different components and is handled in different ways. I thought of trash as a text and therefore garbage (or lack thereof) in public spaces became part of my sense of each place.
Apparent Symbolic Functions

In my casual look at the symbolic functions of signs, I found some obvious examples of signs with secondary authorship. I photographed signs in England, Finland, and France that visibly had more than one layer of authorship; signs that left questions in my mind about which author or voice is more visible. In Cambridge, near the community green space where I stayed, I found a sign advertising a charity fundraiser. On the sign, there was a sticker stating, “This charity does cruel tests on pigs. Do not support it. Support humane research.” (see Figure 10). Though I understood the issue on a surface level, I did not have access to the background of the charity or the opposing party who added the second layer of authorship.
In Paris, I considered the meaning and authorship of a particular sign for an extended time (See Figure 11). Initially, I could not determine if there was a second layer of authorship or not, as the sign appeared cohesive. But, through conversation with a friend who lived in Paris, I learned that a red circle with a horizontal white bar indicated that drivers should not enter the roadway from that direction. With the addition of the stick figure who appears to be carrying the horizontal white rectangle, we found the second layer of authorship quite amusing. In Helsinki, I came across a sign in which I did not understand either layer of authorship. I hypothesized that the large blue “T” on the white background may have had to do with traffic patterns or parking because of its placement on a pole near the street, but I could not know for sure. The addition of the mustache to the sign struck me a humorous, but I could not access the underlying meaning behind the second layer of authorship either
(See Figure 12).

Figure 11 - a sign near Notre Dame in Paris, France

Figure 12 - a sign in Helsinki, Finland
Social Interaction and Linguistic Landscapes

In these three destinations, my social experiences were quite varied. By comparing components of my photographs across countries, I noted that few of my photographs contain people I know. I realized how much my understanding of the linguistic landscapes around me were determined by my social interactions. In England, I traveled with a large group from my university, but my work was quite different from the work of others. I spent the majority of my time there alone. I attended several group activities and spent a few minutes each day at breakfast interacting with undergraduate students or the two supervising professors from my university, or a woman who worked at the bed and breakfast where we stayed.

While in Finland, I also spent the majority of my time by myself. I had to order my own food, check out at the market, and occasionally ask for directions in a region where the official languages are Finnish and Swedish. Luckily for me, many people in Finland also speak English. On the train to the airport, I spoke for some time with a man who was born in Finland. He helped me with my Finnish pronunciation of Helsinki’s roadways from the map I had in my pocket. He spoke Finnish, Swedish, Russian, English, and Hebrew, highlighting for me another cultural difference in the value of being multilingual. My understanding of the signs in these places was largely dependent upon my singular interpretation. In France, I stayed with a friend who lives in Paris and spent the majority of my time with her. She met me at the train station and gave me a guided tour for the week. She knows the roads and the language. I met some of her friends and I stayed in her neighbor’s apartment. She explained
signs to me while we were out in the city. Though I had less need to attend to signage in Paris, I learned more about the history and implications of signage throughout the city through conversation with my friend. My experience and degree of understanding of the signs around me largely depended upon my social interactions.

**Conclusion**

In my brief review of the literature, I found publications highly compartmentalized into journals of specified study (i.e. Japanese Studies, The ELT (English Language Teaching) Journal). I believe that this fact, in conjunction with questions about theoretical framing, units of analyses, issues of authorship and audience, and form and function of signs may greatly inhibit conversation among researchers in the field of linguistic landscapes. Though these studies are useful in their specific fields, they may be equally useful when examined across languages, cultures, and landscapes.

In the shopping mall in Helsinki and the Metro in Paris, I encountered multimedia signs that will likely present new challenges in the study of linguistic landscapes. At the shopping mall and the metro station, I saw signs with interactive touch screens (in Finnish, Swedish, and English in Finland and in French in France), providing consumers the opportunity to select the information provided by the sign and further blurring the lines of author and consumer. As more of these signs appear worldwide, the complexity of linguistic landscape research will undoubtedly increase. Without a firmer hold on the basic theory and framing of linguistic landscapes, moving forward to study multimedia, multimodal, and multilingual signage is tenuous.
at best. Foundations in visual grammar (e.g. Kress & van Leeuwen, 1996), visual literacy (e.g. Avgerinou & Ericson, 1997; Flood, Heath, & Lapp, 2005), as well as new media literacies (e.g. The New London Group, 1996) may help to guide the field of linguistic landscapes to common ground for deeper discussion.
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Englishes, 31(1), 34-47.


Cognitive Interviewing in Cross-Cultural Survey-Item Validation: Considerations for Culturally and Linguistically Diverse Populations

By

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Abstract

Over the past two decades, survey development across multicultural and multilingual contexts has required the modification of pretesting and validation methods for survey items. Cognitive interviewing methods, because of their potential to highlight process errors in the use of such items, have played a significant role in validating cross-cultural use of survey forms and items. In this paper, consideration is given to recent trends and modifications in cognitive interviewing, as related to cross-cultural research. Emphasis on analysis of these modifications from methodological and theoretical perspectives reveals the need for a reconceptualization of concurrent think-alouds and concurrent verbal probing as cross-cultural cognitive interviewing (CCCI) methods. This reconceptualization is positioned as a springboard for further adaptation of the cognitive interview process with reference to these specific methods, thereby enhancing its representativeness of the social factors inherent in the qualitative process of interviewing respondents from multiple linguistic and cultural backgrounds. Based on this discussion, recommendations for rethinking and transforming concurrent and retrospective measures in cognitive interviewing across cross-cultural contexts are provided.

Keywords: cognitive interview, verbal reports, cross-cultural, survey research
Cognitive Interviewing in Cross-Cultural Survey Item Validation: Considerations for Culturally and Linguistically Diverse Populations

The population of multilingual speakers across the globe and within the United States increases daily. With the growing prevalence of world Englishes (Pennycook, 2007) arises the added responsibility of addressing the linguistic needs of diverse populations in a society like the U.S. where English(es) remain the primary linguistic repertoire. In medical, educational, and governmental fields, information is required daily from myriad populations, whose linguistic and cultural backgrounds vary tremendously. Indelibly, the use of surveys functions as a tool for obtaining such information (Willis, 1999). Yet, surveys must simultaneously capture information concerning the cultural and linguistic constructs they hope to measure, and, with every survey comes the added responsibility of ensuring that measures of validity and reliability fall within pre-established parameters for such constructs. Currently, the most prominent method in survey research for auditing differences in the validity and reliability of measures that contain embedded linguistic and cultural factors is cognitive interviewing (Tourangeau, Rips, & Rasinski, 2006). Despite the availability and popularity of alternative statistical methods (see Crocker & Algina, 2006), for almost two decades, cognitive interviewing (CI) remains the substantive

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1 In this paper, CI will refer exclusively to cognitive interviewing.
pretesting method for auditing cross-linguistic and cross-cultural differences that can call into question the use of survey questionnaires and items across the globe. More recently, cross-cultural adaptations of existing surveys have required researchers to improve the validity and reliability of such measures across varied populations (e.g., Pan et al., 2005; Pan, Landreth, Park, Hinsdale-Shouse, & Schoua-Glusberg, 2010). For linguistically and culturally diverse populations, both within and beyond the United States, such an endeavor seems laudable. But for researchers who must grapple with the social complexity within which such a task is embedded, several challenges arise (see Beatty & Willis, 2007; Nápoles-Springer & Stewart, 2006; Miller, Willson, Chepp, & Padilla, 2014; Willis & Miller, 2011). Attempts to conduct cross-cultural cognitive interviewing (CCCI) require an interrogation of assumptions that underlie linguistic and cultural processes. In other words, researchers may need to question whether certain goals for CI have been identified a priori as these may conflict with the very nature of cross-cultural research and the adaptation of a sociocultural approach to CI. In this paper, we consider the methodological and theoretical challenges arising from efforts to adapt surveys in cross-linguistic and cross-cultural contexts. We consider: 1) challenges presented by cross-cultural cognitive interviewing research such that linguistic and cultural differences embedded in CI may continue or even riefy the
systematic variation in survey normalization; 2) our focus on cognitive interviewing as but one example of sedimented, or habitual practices that may unknowingly reproduce cultural and linguistic differences as deficits within survey measures (see Willis, 2015 for a comprehensive review of such factors); 3) our systematic treatment of cognitive interviewing as a means of spurring further inquiry into other research methods susceptible to bias from inherent language and cultural differences. Through reliance on advancements in the field of medicine, language, assessment, measurement, and education, we explore the extent to which the process of pretesting instruments with linguistically and culturally diverse populations have been utilized in CI research with regards to probing methods, questioning whether assumptions of validity for cross-cultural CI applications may in fact be productive goals (Willis, 2015, p. 360). Subsequently, recommendations are made for rethinking the validation measures of CCCI in an effort to propel the field forward. In preparation for these steps, a much-needed context for this analysis is now provided.

**Cognitive Interviewing**

In the history of assessment validation, CI arose as a prominent method used by methodologists and psychologists for evaluating sources of response errors that occurred during the completion of questionnaires (Willis, 1999).
Originally based on the Cognitive Aspects of Survey Methodology (CASM) seminar, cognitive interviewing gained sway based upon the recommendations of Loftus (1984), who expressed the possibility that protocol analysis, a form of CI, be adapted and used during the pretesting of survey questions. Since then, cognitive interviewing has become popular in a number of fields, among these, the medical and statistical fields, survey centers of academic institutions, commercial research centers, and governmental organizations (Willis, 1999; Willis & Miller, 2011). The recommendations made by Loftus have been adopted, yet their impact remains questionable, a source of confusion, and the impetus for this current inquiry.

One source of confusion in CI resides in a limitation in the use of self-report data (the behavioral outcome of CI). Consistently, the data generated from concurrent self-report protocols has centered on content within the survey, and not on the elements involved in the interactive reading processes of taking the survey. Yet, researchers continue rely on CI. They rely on the flexibility and depth afforded by CI as an adjunct for assessment procedures, CI’s qualitative nature, and its concentration on performance of items with smaller samples, all of which have been pivotal in the popularity and productivity of cognitive interviewing as an adjunct for survey research (Willis & Miller, 2011). Clearly, there is the opportunity to investigate this instrumental use of CI.
Though commonly understood as a measure for enhancement of survey questions, definitions concerning CI and the process through which a protocol (defined below) is obtained are not clearly established (e.g., Beatty & Willis, 2007; Presser et al., 2004). Recent work by Miller, et al. (2014) has provided much guidance in understanding these processes within CI. Protocols have been considered an adjunct verbal performance of CI, delivered by a subject while simultaneously completing an experimental task, assessment, or survey. In describing the purpose of protocols of CI, Willis (2005) noted that the goal was to “study the manner in which targeted audiences understand, mentally process, and respond to the materials” processed as part of the task at hand (e.g., completion of survey research process) (p. 3). Later, Willis offered the following description:

Cognitive Interviewing is a psychologically-oriented method for empirically studying the way in which individuals mentally process and respond to survey questionnaires. Cognitive interviews can be conducted for the general purpose of enhancing our understanding of how respondents carry out the task of answering survey questions. However, the technique is more commonly conducted in an applied sense, for the purpose of pretesting questions and determining how they should be modified, prior to survey fielding, to make them more understandable or otherwise easier to answer. (Willis, 2009, p. 106)

Despite variations in definition, researchers who administer CIs generally rely on cognitive theory, in which the CI entails comprehension of the questions administered, retrieval from memory of relevant information, the process of
decision-making, and the response process (see Tourangeau, 1984). Moreover, the term “cognitive interviewing” has often been used to encompass a broad range of cognitive assessment methods (e.g., confidence ratings, paraphrasing, response latencies) (Tourangeau, Rips, & Rasinski, 2006). For the purpose of this paper and within the context of the ensuing discussion, the term “cognitive interviewing” is based on a distinction proposed by Tourangeau, Rips and Rasinski (2006), and is used to refer to “concurrent and retrospective protocols, probes designed to identify response strategies, and requests to the respondent to paraphrase items or to define unfamiliar terms” (p. 327). In this way, protocols are seen as specific examples of CI and also as a label for the outcome data of a CI prompt. We use the term protocol to refer to the set of procedures (or a plan) by which a researcher may elicit verbal data. In other words, the term “protocol” is used for the researchers’ prompting plan, for the respondents’ outcome data, and for the treatment of that data as texts (e.g., response protocols).

To use and create such response protocols and to accomplish the overall goals of CI, survey questions are administered to respondents based on one of two approaches to cognitive interviewing, the think-aloud and the verbal probing methods (Beatty & Willis 2007; Willis, 2005). The think-aloud method is based largely on Ericsson and Simon’s (1984) seminal research, and
depends on only limited facilitation by the cognitive interviewer (Beatty & Willis, 2007). Think-alouds require respondents to concurrently express what they are thinking while they attempt to respond to a given survey item (Bowles, 2010; Heesch, Uffelen, Hill, & Brown, 2010; Willis, DeMaio, & Harris-Kojetin, 1999).

With the verbal probing method, this process is attenuated, allowing the cognitive interviewer to assume a more interactive role. The interviewer uses a set of a priori probes to obtain more elaborated information concerning how and why respondents arrived at certain responses (Beatty & Willis, 2007). Probing techniques utilized by cognitive interviewers are generally directed toward comprehension, paraphrasing, confidence judgments, recalls, and general elaboration and occur after the survey task completion (Willis & Miller, 2011).

For both the think-aloud and probing methods, analysis of response protocols produced follows a similar process within the respective methods. Nonetheless, considerable variation does exist in comparisons across these two methods. Variation between methods becomes a potential problem when both are referred to as “cognitive interviewing”. In some cases, researchers have provided summaries across protocols obtained from both methods. In other cases, researchers have compiled protocols from individual interviews into
generalized reports (Tourangeau et al., 2006). Willis and Miller (2011), in a recent discussion on methods of analysis, highlighted the use of a priori coding schemes. Others have recommended successive aggregation, where a summary of emergent findings is created from individual interviews, followed by synthesis of results across the whole set of transcripts. All in all, analysis has tended to be consistent within either the think-aloud or verbal probing approach.

With regards to the applicability of findings and researchers’ alignment with either think-alouds or verbal probing, evidence of disparities in the use of the concepts and their application continue to be prominent and to impact the eventual findings from the studies, raising the need for an explicit use of terms associated with the method (Willis, 2015). Blurred descriptions of the term “cognitive interviewing” have not assisted with this process, as researchers have been seen to apply the term “cognitive interview” to denote emphasis on either method (think-aloud or probing). In fact, these two methods, think-alouds and verbal probing, are both examples of a larger approach, “cognitive interviewing.” To cite an example, Bercini (1992) and Royston (1989) focused heavily on concurrent think-alouds in pretesting methods that they referred to as ‘cognitive interviewing’. Similarly, the work of Willis (1994) and Gerber and Wellens (1997) reflected an emphasis on retrospective probing, yet the
label ‘cognitive interviewing’ was also applied to this process. For those who advocate a balanced approach (Royston & Bercini, 1987; Willis, Royston, & Bercini, 1991) in which both the think-aloud and probing methods merge, the term “cognitive interview” has come to connote the integrated use of both methods. In terms of the “balanced approach” (Willis, Royston, & Bercini, 1991), we would recommend adherence to an explicit use of the method label (think-alouds, verbal probing) when it is deployed (Willis, 2005, 2015).

**Cognitive Interviewing in Cross-Cultural Research**

Many who have concentrated on the methods of CI cite the advantages and disadvantages associated with both think-alouds and verbal probing as the bases for the vast inconsistencies in CI’s description (e.g., Beatty & Willis, 2007; Willis, 2015). Nonetheless, there is sufficient evidence to indicate that both methods, despite their inherent affordances and limitations, and regardless of their effectiveness with predominantly English monolingual populations, pose serious challenges when applied across and within varied languages and cultures (Beatty & Willis, 2007; Willis, 2015). Cognizant of the discrepancies in CI that arise when used across bi- or multilingual populations, recent efforts have investigated how cognitive interviewing might be best applied in cross-cultural settings, and have sought to understand the effects of such implementation (e.g., Ridolfo & Schoua-Glusberg, 2011; Thrasher et al., 2015).
2011). Though certain challenges have been identified, key factors related to the use of CI in cross-cultural research, which occupy a prominent role, are yet to be adequately addressed. (See Schoua-Glusberg & Villar [2014] for a helpful summary of these issues).

To this end, patterns and challenges arising from the use of CIs across cross-cultural contexts are now discussed. To accomplish this task, we present a brief overview of studies on cross-cultural research with CI followed by considerations emanating from these studies. In doing so, we use the term “cross-cultural cognitive interviewing” (CCCI) to refer to “research that is multicultural, multilingual, multinational, or multiregional” (Johnson, 2006, cited in Willis & Miller, 2011, p. 337). In other words, the process involves pretesting survey items so they function similarly across translations and across administration to various linguistic and cultural groups. Subsequently, methodological and theoretical considerations central to addressing such linguistic challenges are discussed, after which suggestions for the use of CIs in cross-cultural settings are provided.

**Challenges Associated with Cognitive Interviewing in Cross-Cultural Research**

Approximately two decades ago, Johnson (1988) highlighted the challenges associated with utilizing cognitive interviewing across varied
linguistic and cultural groups. Among these challenges were: (a) differences in the ways items functioned based on investigators’ language competence during their administration and their subsequent translation of the interviews; (b) limitations posed by the lack of multilingual investigators required to review all interviews; (c) the absence of a common language for discussion by all team members; and (d) specific and subtle discrepancies across languages or cultures (Johnson, 1988; Willis & Miller, 2011; Willis, 2015). In response to these and other concerns, survey researchers have increasingly focused attention on how such issues may be addressed. In addition, Schoua-Glusberg and Villar (2014) add a two-part organization of issues in cultural and linguistic variations in survey research. They rightly point out that comparability cannot be assumed, but must be tested. They point to “translation problems,” which include: uncovering mistakes, regional variations, vocabulary and idiomatic speech, and variation among “experts.” They also point to “problems with source questions,” which are cognitively difficult questions. Finally, they point to the impact of “cultural differences,” which include unknown concepts, and cross cultural variation in concept relevance. Taken together, these factors present a formidable argument for attending to practices of cross-cultural cognitive interviewing for survey research. Schoua-Glusberg and Villar (2014) offer: “cognitive interviewing provides a means for assessing translation’s
performance and quality” because “a better use of resources calls for having the best possible drafted questions before testing begins” (pp. 66-67).

As indicated earlier, cross-cultural cognitive interviewing (CCCI) research focuses on pretesting survey items so that they function similarly across multicultural, multilingual, multinational, or multiregional populations (Willis & Miller, 2011). Despite the ability of statistical and psychometric methods (i.e., differential item functioning, item response theory; see DeVellis, 2003) to alleviate concerns with non-comparability emerging from survey data, understanding of the source of these internal errors (as made available through qualitative methods) holds promise for significantly extending the depth of understanding concerning the ways in which items within surveys reflect cross-cultural and linguistically based errors.

Testing for comparability of results across language versions based on the lack of a common language for discussion by all team members is another factor that poses challenges to assessment. As mentioned in Johnson’s (1988) earlier work, the absence of a common language was a problematic issue. It is also the case the language competence of those who translate and administer the survey items during the validation processes is a real impact. And as previously documented, investigating the source of errors via cross-cultural CI is a viable alternative to pretesting, which is designed solely for the detection of
challenges faced with comparability (e.g., Tschann et al., 2013). As such, it is no surprise that researchers interested in pretesting survey response items have used CI to identify other measurement challenges arising from the use of the tool with culturally and linguistically diverse populations (e.g., Agans, Deeb-Sossa, & Kalsbeek, 2006; Nápoles-Springer et al., 2006; Pasick et al., 2001). In the majority of these studies, cognitive interviewing was deployed to ensure that surveys performed consistently across diverse populations. But, consistency rating for survey items may miss the procedural inconsistencies, such as stylistics and lexical variance between participants, or variations in the specific linguistic competencies of item translators, both resulting from linguistic and cultural differences. It may be more informative to identify these discursive sources of the errors. This would require a different intention for the researchers who seek to validate the surveys. In fact, we suggest that the source of the discrepancies that occur in items during individual uses of a survey may emanate from the participant, the investigator, a previous technical alteration, or a combination of the actors’ efforts. We use three points of focus to discuss the use of CI in cross-cultural studies: procedural approaches to CI, methods for dealing with language disparity, and issues reflected in the findings of CI transcripts. In the following sections, we present the three sources of discrepancy and use each to make recommendations for CI in literacy
Procedural Approaches to CI in Cross Cultural Studies

In CI studies reviewed, there was a tendency to use either the think-aloud approach, verbal probing approach, or to utilize both methods. Researchers employed variations of the cognitive interviewing method with groups from diverse populations in order to understand the measurement challenges and obstacles faced by populations designated as different (Agans, Deeb-Sossa, & Kalsbeek, 2006; Daniel, Miller, & Wilbur, 2011). In certain studies, concurrent think-alouds (i.e., which require the completion of the research task, and verbal reflection about the current task, simultaneously) were utilized with English, Cantonese, Mandarin, Spanish, and Vietnamese speakers, as well as with Mexican immigrant women and participants from other ethnic backgrounds (Agans, Deeb-Sossa, & Kalsbeek, 2006; Pasick et al., 2001; Reeve et al., 2011). In other studies, retrospective verbal probing (i.e., which requires reflection after the research task is completed) was deployed with Latino, Black, and non-Latino white populations (Nápoles-Springer et al., 2006) as well as with Spanish, Chinese, Korean (Chan & Pan, 2011; Willis et al., 2008), Russian (Chan & Pan, 2011), and Vietnamese speakers (Willis et al., 2008). Alternatively, retrospective probing was conducted with monolingual English and monolingual Spanish speakers as well
as with bilingual Spanish and English speaking participants (Goerman & Clifton, 2011). In a few cases, concurrent think-alouds and retrospective probing were combined to elicit responses from participants of varied cultural backgrounds (Daveson et al., 2011; Yam, Chow, & Ronen, 2005). Amidst the variations of CI used in these studies, retrospective probing tended to be used almost as often as concurrent methods (also see Willis, 2015 for a review) and seemed to be more reflective of the nuances brought about by cultural and linguistic differences because these probes provided insights into the sources of error and the reasons why participants experienced the challenges arising from items. This heavy reliance on retrospective protocols in conjunction with or in isolation from concurrent reporting is contrary to recommendations made by Ericsson (2006) that favor concurrent think-aloud protocols. While researchers generally failed to overtly highlight the merits of either approach for the results obtained (Willis, 2015), we suspect this reliance on retrospective protocols arises from differentiated intentions of the researchers such that concurrent verbal reports might effectively focus on item differentiation, whereas retrospective, verbal probing can highlight the nuances brought about by cultural differences, as these may be enmeshed in social performance rituals. There is also the possibility that participants responding to retrospective probing may be more attuned to the “ultimate purpose both of a survey and of
the cognitive interview itself” because they have engaged in the activity prior
to and in isolation from further discussion concerning the measure and are
primed by “optimal procedures or scripts” prior to retrospective probing that
“convey these messages” (Willis, 2015, p. 387).

**Language Use in Cross Cultural CI**

During the process of pretesting surveys, researchers have pursued one
of three options in dealing with the phenomenon of language differences
between and among participants and researchers: identification and translation
of chosen measures, development of new measures, or assessment of already
established measures. In the majority of studies where cross-cultural consistency
was desired, researchers preceded the administration of CIs with a process of
translation from a source language to the target language (Chan & Pan, 2011;
Daniel et al., 2011; Nápoles-Springer et. al, 2006; Willis et al., 2008; Yam et
al., 2005). For instance, Willis et al. (2008), in an attempt to ensure that the
Tobacco Use Special Cessation Supplement to the Current Population Survey
(TUSCS-CPS) functioned effectively for Chinese, Spanish, Korean, Vietnamese,
and Cambodia speakers, first translated the English version into the preceding
languages. Similarly, Yam et al. (2005) engaged in a series of translation
processes prior to the use of retrospective and think-aloud interviews.

Deviating from this trend, two instances were identified in which
researchers created an original, or new survey. For instance, Agans et al. (2006) focused on the creation of a survey to respond to the need for documentation of sources of error for Mexican immigrants concerning their recall of their last monthly periods. In this case, rather than translating previously established instruments, as had been done in most studies, the survey items were constructed based on the linguistic and cultural characteristics of the particular group in focus, and the items were subsequently pretested on participants from this population. Using an entirely different approach, Goerman and Clifton (2011) pretested survey items for their use with monolingual and bilingual participants on a bilingual questionnaire created for this purpose. In this case, the approach to language variation was the use of bilingual content made accessible to members from varied linguistic populations.

The third approach to addressing the cross-cultural issue of language differences, and most germane to the current paper, was the use of cognitive interviews to assess the participants’ comparative performances on already established surveys available in various languages (e.g., Daveson et al., 2011; Ridolfo & Schoua-Glusberg, 2011). The cognitive interviewing provided qualitative data pertinent to the processing of items on the different linguistic versions of the surveys. An example of this approach was reflected in Pasick et
al.’s (2001) use of think-alouds in five languages to pretest survey items from three multiethnic health surveys. Thrasher et al.’s (2011) assessment of systematic measurement bias of survey questions from smokers in the United States, Australia, Uruguay, Mexico, Malaysia, and Thailand also involved pretesting based on pre-established instruments.

Across these approaches, the third method that uses CIs to assess bias in already established surveys, appeared to reveal the nuances arising from participants’ social and contextual uses of language as opposed to the preceding methods that focused more on linguistic differences arising from comparisons across translations or from the development of surveys using members of a particular population. In fact, Schoua-Glusberg and Villar (2014) focus “on the advantages of using cognitive testing [interviewing] for language versions translated from a finalized source questionnaire” (p. 53, bracketed addition ours, italics in original). Notwithstanding, the use of cognitive interviews to assess comparative performance on already established surveys may be affected by the very processes of analysis to which interview protocols are subjected. The use of collaborative or joint analysis, as opposed to independent analysis, across linguistic groups has been shown to be more advantageous due to a reduction of the “possibility of analyst-dependent bias” from “separate, uncoordinated data reduction and interpretation” (Willis,
and may therefore hold greater potential for translations.

Therefore, it appears that collaborative use of CI with extant surveys reveals the most germane information regarding the issues second language test takers may encounter with specific survey items.

**Functions of Cross Cultural CI**

When used as a tool in cross-cultural studies, CI performed a number of functions. In certain studies, CI procedures reflected variance related to connotation of ideas across language and culture (Thrasher et al., 2011). For example, in collecting CI data to assess and improve the International Tobacco Control Policy Evaluation Project (ITC Project) collected CI data to assess and improve in survey questions with 20 adult smokers across six countries. Researchers deployed CI in conjunction with behavioral coding and found that the CI protocols were more likely to indicate challenges with measurement biases underlying questions arising from differences in culture and language and to address silent misinterpretations on the part of by respondents. In others, CIs revealed variations based on ethnic variations in cognitive processes differences such as interpretation (Daniel et al., 2011; Nápoles-Springer et al., 2006), memory, retrieval, judgment formation and response editing were apparent (Daniel et al., 2011; Pasick et al., 2001). For example, Pasick et al. (2001) used secondary data from three independent studies
based on surveys conducted in five languages and found that CI, in conjunction with other procedures, revealed ethnic differences as a source of variability in cultural appropriateness and translation reliability, validity, and cognitive processes. CI also served to identify cultural appropriateness of items and barriers embedded in translation (Daniel et al., 2011; Nápoles-Springer et al., 2006) and how these caused breakdowns in comprehension (Pasick et al., 2001; Thrasher et al., 2011). For example, Nápoles-Springer et al. (2006) conducted CIs with 48 Latinos, black and non-Latino whites and used retrospective probes in conjunction with survey transcripts. Of the 126 problematic survey items identified, 94 of the problems identified in 126 items on a 159-item test were related to ethnic and language similarities and differences and were identified by CIs. Verbal probing was specifically helpful in identifying lexical problems (Daniel et al., 2011) and overall, analysis of responses indicated respondents’ misunderstandings about the more general role of the survey response in general (Chan & Pan, 2011). Other findings revealed respondents’ unfamiliarity with the survey process (Agans et al., 2011) and challenges to validity in which survey item questions failed to capture what they were intended to represent (Pasick et al., 2001; Ridolfo & Schoua-Glusberg, 2011). Across these functions, CIs tended to be used in conjunction with other methods for pretesting and often revealed more
qualitatively valuable information about biases in survey items than did their procedural counterparts, suggesting that this procedure may function less effectively when used in isolation.

The literature here reveals that CI often yields information about biases that is richer and more valuable than other pretesting methods. Data richness may be due, in part to the fact that retrospective probes tend to be largely popular in the CI process (Willis, 2015) and that these have been found to provide valuable information about the cultural and linguistic differences experienced across languages. The findings across these studies seem to suggest that retrospection, along with testing based on already established surveys, yield the greatest benefits for CIs. Certain methodological and theoretical concerns that may arise based on these patterns are now explored.

**Methodological Concerns**

As indicated earlier, the heavy reliance on retrospective methods (probing) in conjunction with or in isolation from concurrent (think-alouds) methods in CI studies, though not alarming, represents a direct contradiction to the recommendation for concurrent think-alouds established in the think-aloud literature. Drawing from research in the second-language acquisition and literacy fields, concurrent think-alouds are the preferred verbal report tool utilized to understand language learners’ literacy processes. The concurrent
think-aloud approach in the these fields is popular because of its credence, as observed in Ericsson and Simon’s (1984) seminal research on protocol analysis. In their recommendations for the use of what they call verbal reports (i.e., think-alouds), the researchers have generally recommended the use of concurrent methods because they increase representativeness of thought (Ericsson & Simon, 1984). Moreover, proponents of CI in survey research acknowledge the reliability embedded within concurrent responses, as compared to those obtained retrospectively, after the interviewing process (i.e., retrospective protocols) (e.g., Forsyth & Lessler, 1991).

Nonetheless, evidence emanating from the literature (e.g., Harkness, Pennell, & Schoua-Glusberg, 2004; Oksenberg, Cannell, & Kalton, 1991; Willis, 2005) indicates that many participants tend to produce poor (concurrent) think-alouds and that, “despite widespread use, concurrent verbalization remains controversial because of concerns that it changes the cognitive processes mediating the performance of tasks in comparison to the traditional silent conditions under which psychological phenomena are typically studied in the laboratory” (Fox, Ericsson, & Best, 2011, p. 317). Again, we point out that speculation of change to cognitive process as a result of requiring individuals to report thought during a given act is contrary to earlier theorizing by Ericsson (2006). Perhaps some resolution is found in thinking
about concurrent think-alouds being used to monitor the occurrence of error in survey items, whereas retrospectively probed protocols may be more useful in gathering data about the potential sources of the errors. In response to this assertion, Bowles (2008) has argued that the limited time between verbalization and performance of the task is pivotal to the validity of concurrent methods. But, as Sachs and Polio (2007) confirmed, and in keeping with recent claims (Goerman & Caspar 2010a, 2010b; Harkness, Edwards et al., 2010; Park, Sha, & Pan, 2013), “there is no way of knowing whether a given verbalization is a veridical account of learner’s awareness of linguistic input, which makes relationships between awareness and other phenomena difficult to determine with confidence” (p. 73).

Considering that it is virtually impossible to relay information about memory contents while simultaneously reading the text, and that responses to survey items must be produced “after” the act of reading, it may be that validity of concurrent verbal protocols (from think-alouds) is not as dependent on its concurrent or retrospective nature. Rather, the pertinent factor may be the extent to which information reporting is delayed following the reading task, as well as the capacity of the cognitive interviewer to minimize such delays when obtaining concurrent and retrospective protocols (see Ericsson & Simon, 1993; Pressley & Afflerbach, 1995; Taylor & Dionne, 2000; Van Gog, Paas &
Van Merrienboer, 2005). While Willis (2015) attends to the demographic characteristics of interviewers as a key factor influencing results and highlight the importance of training for cognitive interviewing, even more important is the extent to which training for cognitive interviewers is standardized across culturally and linguistically diverse survey measures in relation to the interactions fostered by interviewers. This presents a significant concern because the cultural practices that govern training for interview processes in one language or culture may be significantly different from those to which cognitive interviewers subscribe in another. This may be because the extent to which participants are allowed to interact freely with interviewers may largely determine the types of results obtained from probing sessions (Willis, 2015).

Retrospective protocols, which function in isolation from the task of reading survey items, were gathered as a result of the deployment of verbal probes in a number of studies (see Willis, 2015 for an additional review). Both independently and in conjunction with concurrent think-alouds, retrospective probes have repeatedly reflected the difficulty encountered by participants in accessing and explaining the underlying causes of action surrounding retrospective protocol production (Ericsson, 2006; Ericsson & Simon, 1984; Nisbett & Wilson, 1977). In fact, decades ago, Russo, Johnson, and Stephens (1989) confirmed that retrospective protocols (with information coming from a
reconstruction within long term memory) were more likely to include fabrication than were concurrent protocols. Moreover, in cautioning against the use of retrospective methods, Ericsson (2006) maintained that the “closest connection between actual thoughts and verbal reports is found when people verbalize thoughts that are spontaneously attended to during task completion” (p. 221).

Yet, researchers in CCCI continue to be largely unaware of, or fail to acknowledge, the potential impact of retrospection on the quality of protocols obtained (Willis, 2015).

Clearly, a consensus that privileges concurrent over retrospective methods, or vice versa, is yet to be identified in the CI literature. This is regardless of whether the researcher is interested in the sources of error or in the thought processes that occur during the (concurrent) think-aloud retrospective reporting process. Moreover, for participants whose languages or language vernaculars vary in the production of protocols, and whose responses must maintain comparability across cultures and languages, it seems likely that such a significant debate concerning method may further confound results. In cases such as the United States, where large numbers of individuals are either speaking a variation of English, learning a new language or bi-/multilingual, Ericsson and Simon (1984) have explained the complexity involved in producing a verbal report protocol in multi-lingual contexts:
Persons fluent in a second language can usually think aloud in that language even while thinking internally in the oral code of their native language or in non-oral code. In this case, there is nearly a one-to-one mapping between structures in the oral code of the first language [variety] and the code of the second language [variety] that is used for vocalization. How much the thinking is slowed down will then be a function of the subject’s skill in the second language. (p. 250)

In other words, in cross-cultural research, language differences that manifest within task completion appear to be an added, inherent variable, which influences the linguistic product of such learners. Therefore, any attempt to verbalize reports not only undergoes transformation during verbalization, but also experiences alteration due to language differences between the participants and the interviewer. Specifically, the language task required and the demand to verbalize this task must compete for the linguistic capacity (Sanz, Lin, Lado, Bowden, & Stafford, 2009), thereby affecting the extent to which protocols reflect completeness, accuracy (Beatty & Willis, 2007), and by extension, validity (Willis, 2015).

So, perhaps, in the search for validation of the CCCI process, the key to ensuring that participant protocols function as desired, is not necessarily based on strict adherence to either a standardized concurrent or retrospective method. As Russo, Johnson and Stephens (1989) have confirmed, concerns surrounding protocol veridicality (i.e., validation) are perhaps misdirected. The possible futility of testing validity in verbal reports (think-alouds) appears
reasonable given that its accuracy, as relates to underlying processes, has already undergone significantly alteration due to linguistic variability factors deployed during verbalization of the process (Lantolf & Thorne, 2006; Vygotsky, 1978). Understandably, a more feasible approach to CI may relinquish emphasis on “validation” per se, and rather, introduce notions of trustworthiness and authenticity (Guba & Lincoln, 1994), key elements that seem critical to logistical and procedural discussions associated with CCCI. Clearly, the search for “validity” in protocol analysis becomes justifiable only in the event that this process takes into consideration the qualitative, even interpretive nature of CI protocols and an analysis of their inherent variability. The larger search for validity is, of course, different from, but inclusive of, item validation.

As qualitative constructs, trustworthiness and authenticity (roughly analogs of reliability and validity in quantitative inquiry) seem well suited to the concept of methodological rigor so often desired in CI. The variance within qualitative analyses of CIs diminishes the probability that linguistically and culturally varied populations will reflect the same or similar conclusions in response to a given questionnaire (Forsyth, Rothgeb, & Willis, 2004). Differences in product are inevitable and therefore must be anticipated. Researchers must provide substantive descriptions of process and include
detailed explanations of data collection and analysis procedures. Detailed
descriptions of procedures allow claims and conclusions derived from protocols
to be traced back to these procedures. Trustworthiness and authenticity can be
enhanced. In the search for methodological rigor, researchers may therefore
rely upon such an approach as a substitute for the internal and external
“validity” as fixed constructs. If the goal of researchers is to utilize cognitive
protocols results to revise survey items, trustworthiness of process and validity
of item both support this goal. Ultimately, the consensus is that flexible probing
be adapted because of the effectiveness with which it can be deployed. This
consensus suggests that the process and context within which the probing is
enacted as well as the measures used to evaluated this process are all vital in
assembling a complete picture.

**Theoretical Concerns**

In considering linguistic differences with populations among which
survey items are pretested, the methods that have been used to address
linguistic differences raise salient theoretical concerns. As noted throughout
various studies, researchers have primarily translated original
measures/surveys from a standard language, created a new, parallel
measure/survey, or assessed already existent measures/surveys present in
different languages.
Problems posed in relation to translation have been previously documented in the literature (e.g., Abedi, Hofstetter, & Lord, 2004; Cha et al., 2007; Fischbacher, Hunt & Alexander, 2004; Nápoles-Springer, 2006). There are those who question the capacity of translations to capture the nuances present in concepts documented in one language and absent in another (conceptual equivalence), and therefore, respondents’ understanding of concepts as relates to variation across linguistic groups (linguistic equivalence) (Agans et al., 2006). Others note that even when translations seem representative of a population’s cultural norms (Schoua-Glusberg & Villar, 2014), an added challenge arises in the frequently necessitated attempts to translate all cognitive interview responses back into an original common language in order to facilitate discussions concerning comparability, as well as other methodological issues (Willis & Miller, 2011). Therefore, translations continue to be questionable in terms of the extent to which they can provide reliable information about biases across different populations on a given survey.

In situations where new measures or surveys are created and subjected to pretesting, researchers are presented with similar challenges faced in translation, as well as other vexations. One of these concerns is prominent with less standardized languages (i.e., Creoles, pidgins) where the use of words
from other languages may be integrated with words from the original language, e.g., Spanish-speaking Mexicans who use English words (Agans et al., 2006). Another concern is the socio-economic variation among respondents. The extent to which respondents from different socio-economic backgrounds possess commonality across dialects required to successfully interact analogously with instruments such as questionnaires remains an issue (Johnson et al., 1997; McQuiston et al., 2002).

In scenarios with less standardized language and variation across socio-economic groups, a combination of cognitive interviews and other survey research methods, such as focus groups, may be beneficial to overcoming the barriers faced. Combined approaches are consistent with a cognitivist approach to the deployment of CIs, such as analysis of protocols that operate predominantly from an information-processing approach (see Ericsson & Simon, 1984). However, the linguistic complexity inherent in the production of protocols necessitates alignment with a more encompassing theory in which social complexities inherent in understanding linguistic, cultural and social processes are afforded sufficient representation.

Despite acknowledgement of the need for a sociocultural or even anthropological approach to CIs (Chepp & Gray, 2014; Gerber, 1999; Gerber & Wellens, 1997; Miller, 2003; 2011), dependence on cognitive
theory is manifested in both approaches of cognitive interviewing, that is, in both think-alouds and verbal probing. The general consensus on the need for cross-cultural methods has therefore failed to sufficiently invoke the need for a theoretical framework that more appropriately reflects the social milieu within which cognitive interviewers function. It may have been useful in the concurrent think-aloud approach to view the interviewer as “data collector,” whereas, in retrospective probing, view the interviewer as “investigator” (Beatty & Willis, 2007, p. 294).

Yet, clearly, and as suggested by Miller et al. (2014), with cognitivist approaches to CI, the underlying supposition remains that the information is “gathered” and “obtained” rather than “constructed” and “negotiated” throughout the interview process. And, despite an understanding of what cognitive interviewing should entail, researchers continue to adhere to methodologies of cognitive interviewing that reflect reading and protocol analysis as cognitive constructs, often ignoring the social contexts (i.e., setting, language, power differential) in which they are embedded and reproduced. Early on, Nisbett and Wilson (1977) challenged this notion. In their view, think-alouds were not necessarily a reflection of the contents of thought, but rather, could represent re-constructions of these thoughts, and potentially, were therefore more likely influenced by socio-cultural contexts, constructs addressed
in this review.

A more specific treatment of CI method sheds additional light on this inquiry. In the field of literacy, proponents of a sociocultural approach to reading and concurrent verbal reports (i.e., think-alouds) support the notion of re-construction during the process of reading and thinking (e.g., Au, 1993; Rosenblatt, 1978; Vygotsky, 1978). Survey researchers have also began to reflect such notions in their descriptions of a sociocultural approach to CI that favors exploration into “the respondent’s life experiences and cultural context” and “interpretive processes that encompass a wider range than the somewhat narrow concept of ‘encoding’ as depicted in the standard cognitive model” (Willis & Miller, 2011, p. 333). From the CI literature, a sociocultural approach to CI emphasizes the influence of “social location and cultural context through all phases of the survey-response process” (p. 334).

In keeping with this notion, Chepp and Gray (2014) take an interpretivist framework to guide their discussion of cognitive interviewing. Arguing “that the survey process is fundamentally a social encounter” (p. 8), they examine the role of narrative theory, the sociological concept of Verstehen (insider understanding), and Geertz’s (1973) concept of thick description to provide a cognitive sociological framework for cognitive interviewing. From these stances, Chepp and Gray argue “that “expert
review” of survey questions is not an advocated evaluation approach” (p. 13).

Of course, with the intent of cross-cultural and cross-linguistic comparability, we agree. However, we do not suggest, nor do we suspect that they recommend, dispensing with all expert review. We also agree with their suggestion to “recruit respondents from different backgrounds in an effort to uncover [sic] (all) patterns of interpretation” (p. 13). Our parallel, yet distinct, discussion of think-alouds in socio-cultural and linguistically-based literacy research that follows next provides an avenue through which to consider the justifiability of an interpretive approach to CI.

**CI Applied to Literacy Studies**

Beyond the field of survey research, discussions are underway in other fields of inquiry that describe how the two approaches emphasized by CI (i.e., think-alouds and verbal probing) may be conducted and interpreted within a sociocultural approach. There is much overlap in literacy-based studies of think-alouds and probing and the use of think-alouds and probing in survey validations. A sociocultural view of verbal protocols form literacy inquiry highlights speech as socially constructed and therefore not a mere reflection of cognitive processes (Smagorinsky, 2011). In Smagorinsky’s view, a sociocultural approach to cognitive interviewing focuses less on whether contents embedded in thought “spill over” in contents of talk, as is often
reflected in approaches to CI within survey research, and more on the constructed nature of the entire interaction. Smagorinsky’s approach evolves from an integration of the tenets of Ericsson and Simon’s (1993) information processing (i.e., cognitivist) and Vygotsky’s (1978) socio-cultural-historical theory, and views “think-aloud methodologies” as part of a “hidden dialogue” (p. 237).

Think-alouds, considered from a sociocultural perspective, take into consideration the relationship between the researcher and respondent, much like Chepp and Gray’s (2014) claim for cognitive interviewing as a “social encounter” (p. 8). Such considerations include the construal of the researcher by respondent and effects the speech genre may have produced, the content of verbalizations, the trust invested in the listener, the implicit rules underlying appropriate and/or inappropriate speech within given contexts, the emotions both expressed and observed in speech, as well as other facets inherent in face-to-face communication (Smagorinsky, 2011). Smagorinsky’s sociocultural perspective on think-alouds invokes other factors embedded within the context of the cognitive interviewing process that may affect participants’ meaning constructions in response to the situation and variations in individuals and/or materials. A socio-cultural approach is not a method as much as it is a
perspective toward what are the data, and the impact of the socio-performative aspects of the creation of that data (Bell, 2008).

A sociocultural approach to cognitive interviewing bears close resemblance to the cross-cultural approach described by Willis and Miller (2011), allowing representations of language learners’ reading processes to reflect the social role of speech. Such representations require the overall research design to take into account learner-text, learner-him/herself and learner-researcher interactions (Smagorinsky, 2011). As the approach recognizes the mediation of speech/language, it offers far different representation of the social nature of the interviewing act required, as it enables cross-cultural disparities to be captured, documented and respected in the interviewing as a social process. The examination of these interactions permits exploration of the social/contextual variables implicit in language learning survey participants’ verbalizations and exploration of constructed and co-constructed verbalizations within the researcher-participant dyad, the ability to inform and enhance social construction of textual meaning through mediation, and the opportunity for meaning-making processes to be discovered during the reading of text are all made more available via a sociocultural approach, or what Chepp and Gray (2014) call an interpretive approach in the context of cognitive interviewing.
By the same token, in a sociocultural view of reading and literacy (Lewis, Enciso & Moje, 2007), meaning-making during survey test validation is an interaction with a text, where the survey is written by the researcher and subsequently read by the participant. In such a “blueprint” situation, the researcher becomes a mediating variable between the authors’ text blueprint and the readers’ construction of meaning for that text. The task with which CI is most often associated in survey research, reading is construed as a meaning-making process. From this perspective, readers’ interactions with authors, via their texts, is an instantiation of the wider social context, in which readers assume heightened significance (Au, 1993; Rosenblatt, 1978). Further, social interaction is inherent in the reading act (Vygotsky, 1978). Sociocultural theories of reading designate reading as “utterance,” an act in which dialogue occurs between readers and the authors of texts, as well as between and among speakers around text. As such, reading would be conceived of as the process through which respondents engage in verbalizations with text and with others in response to text as they construct comprehension (Bakhtin, 1986, p.107). And, within the CI context, reading of a survey would therefore evolve as a social process, one in which the reader constructs meaning with both the text and interviewer in the process of providing information concerning the items presented. From the literature beyond survey research, the argument for
an interpretive method thus takes into consideration reader/participant interaction with interviewer as well as reader/participant interaction with text.

**Reconciliation of Effects**

In approaches that use CI in cross-cultural test validation, the intent is to improve the precision of measure across populations that may differ both culturally and linguistically. From pinpointing variations in cognitive processes to elucidating cultural appropriateness of survey items, the findings of CI studies allow for a host of measurement issues to be addressed in cross-cultural survey methodology. Among the methods which facilitate identification of such issues were more rigorous levels of comparative cognitive testing (Miller et al., 2011); the use of vignettes as an alternative method of pretesting (Goerman & Clifton, 2011); the application of constant comparative methods to cognitive interviewing protocols (Ridolfo & Schoua-Glusberg, 2011), and the use of methodological triangulation, in which cognitive interviews functioned in conjunction with other methods for pretesting survey items (Daniel et al., 2011; Goerman & Clifton, 2011; Reeve et al., 2011; Thrasher et al., 2011).

Yet, even when these modifications were made, results by CCCI researchers focus on establishing item similarities/differences across populations, rather than representing the causes of differences or in identifying ways in which to explore the reasons for such differences. Seen as a pretest
method within a cognitive approach, identifying differences may appear to be the goal. Yet, from a socio-cultural approach, differences and similarities in survey completion may lead to insight, and the final goal of understanding may or may not result in changes to the instrument. Notwithstanding, a few exceptions were found. For instance, Ridolfo and Schoua-Glusberg (2011) explained the necessity of theoretical saturation in constant comparative analysis. Similarly, Willis and Miller (2011) maintained that:

> Issues which arise in one language or culture, but not another, must be reconciled, and decisions made concerning whether these are due to errors of translation, cultural disparities, or artifacts of varied approaches to the conduct or analysis of the interviews” (p. 338).

The very notion of cross-cultural considerations in pretesting requires acknowledgment of the impact of individual differences in situ. Failure to acknowledge effects of individual differences may prove to be problematic for examining CI processes. Inattention to individual differences in protocols constitutes a challenge in regards to participants’ developmental levels and linguistic backgrounds. Researchers also run the risk of essentialism, categorizing individuals based on normative assumptions of given populations, and perhaps defeating the very purpose for which cross-cultural research was designed.

In general, reports of social contexts for CI can cite differences in participants’ developmental levels and linguistic backgrounds and the
interrelationships between multilingual learner backgrounds and findings. These context effects appear unreported in many studies. Further, in many cases, researchers failed to acknowledge such factors as variation in participants’ linguistic competence, or variation in participants’ abilities to verbally report contents of thought. In others, the assumption that a certain educational level automatically translates into expert reader status fails to take into consideration the individual literacy differences of participants operating at similar educational levels, the potential situatedness of the survey response performances as well as variations in specific cultural, cultural influences on specific survey-related background knowledge, experiences, and respondents’ culturally-based attitudes toward interpretations of texts. Willson and Miller (2014) appear to have anticipated this complexity: “it is necessary for cognitive interviewing data to capture the specific experiences and perception that respondents consider when answering a question. This type of data emerges only as respondents relay the story of “why they answered the question as they did” (p. 33). Willson and Miller’s use of the metaphor “story” references their theoretical use of narrative framing in the elicitation of participants’ responses.

Perhaps, a first step in addressing attempts to conduct cross-cultural cognitive interviewing may be interrogation of assumptions underlying the
pretesting process. In other words, researchers may need to question whether certain goals for CI have been identified a priori which conflict with the very nature of cross-cultural research and the adaptation of a sociocultural approach to CI.

**Future Applications of Cross-Cultural Research**

The purpose of this paper was to consider the extent to which attempts have been made to utilize cognitive interviews (CIs) in the pretesting of psychometric instruments in cross-cultural research with linguistically and culturally diverse populations; attend to associated issues inherent in this process; and subsequently, provide recommendations for rethinking CI as a pretesting method in survey research. Albeit, the discussions presented here are by no means conclusive, and are merely a framework for rethinking the use of CI in survey research. Considering these purposes, recommendations based on the previous discussion are now outlined.

First, based on advances in sociocultural theory in relation to the processes inherent in reading and protocol analysis, cognitive methods for interviewing need to be elaborated to reflect the social context in which respondents’ responses are framed. Thrasher et al. (2011) call for further research to “determine the possibilities for cultural tailoring of CI strategies to best suit the social and conversational norms surrounding social interactions”
(p. 456). Miller, Willson, Chepp, and Padilla (2014) recommend analysis through cognitive interviewing will allow for interpreting patterns across groups, assessing item’s comparability, determining accuracy of translations, and equivalence across socio-cultural groups (p. 153). In attempting to conduct such research, the following may be considered.

With regards to preparation for data collection, cognitive training processes need to undergo certain modifications. These include moving away from standardizing the protocol questions to be posed by interviewers. More flexible framings for queries may accommodate variable presentations to different participants; and increasing the likelihood that researchers are equipped to deal with possible responses emerging from informal interactions with respondents. Training would not require interviewers to have respondents follow a prescribed method for verbalizing, but rather, these “training” sessions will be used to gauge respondents’ appropriation and interpretation processes during their reading of the items in order to gain an in-depth understanding of how participants construct meaning while attempting to respond to items. As Smagorinsky (2011) noted:

“The ‘training’ period, then, is not so much practice for a later polished performance as it is a key developmental point during which researcher and participant move toward intersubjectivity and thus toward a greater sense of isomorphism with respect to the task. (p. 233)

For the processes of reading and collection of protocols, ensuring that
the interview proceeds as a conversation rather than a scripted process (in which interviewer interaction with respondents is restrained), may serve to be more representative of what occurs during the meaning-making process for respondents. Interviewer interference distorts the reading task in protocols collected during validation of test items. This distortion is analogous to distortion emanating from the very nature of pretesting as a deviation from the exact conditions of completing items encountered in standard questionnaires. Further, in completing self-reporting measures, respondents may be allowed to consult with the interviewer and to clarify their understanding of the questions read at leisure. Of course such interaction must also be systematically deployed. It may even be that freedom to explore their preconceived notion of the questionnaire with an expert with regards to content of survey items may offer a more representative account of their responses than do respondents’ standardized protocol results while using the measure in question.

In the later processes of protocol analyses, participants’ individual differences, constructed during interpretation of protocols, may come to explain possible sources of variation present in data, a different difference than inherent test item ambiguity. As Daveson et al. (2011) asserted, recognition of the qualitative nature of CI allows for insight into how “respondents’ understandings were shaped by their experiences, relationships, ethnicity,
sociocultural context, values and knowledge” of the constructs raised in survey items (p. 348).

An excellent framework for approaching this process is Miller et al.’s (2011) proposed levels of analysis. Miller proposes that three levels of analysis are required in cross-cultural considerations of survey responses: individual descriptions of question response processes (i.e., within-interview analysis), patterns of responses processes (i.e., across interview analysis), and patterned differences in subgroups (i.e., across sub-group analysis). By extension, a consideration of social context in all three of Miller’s circumstances would identify individual sources for variations as a function of analysis within interviews, analysis across interviews, and analysis across sub-groups, respectively. Not only does leveled analysis facilitate a reliable source for identification of errors, but it also reduces the probability that “essentializing” occurs across interviews and sub-groups. In turn, engagement in leveled analysis may provide a consistent reminder to researchers that qualitative interviewing processes do not produce generalizable results and therefore the results obtained from survey items cannot be said to function for other individuals within similar populations in the ways that they have functioned in pretesting (see Willis, 1999).

A previous recommendation highlighted by Willis and Miller (2011) is
the use of cognitive interviews in conjunction with other methods, thereby implementing methodological triangulation (Patton, 2002). Methodological triangulation constitutes the use of multiple methods to implement research procedures. In the case of CIs, methodological triangulation may be achieved through the pretesting of survey items from a sociocultural approach, as well as administration of CIs administered in conjunction with other qualitative and/or quantitative approaches (see Ridolfo & Schua-Glusberg, 2011). Currently, methodological triangulation has been deployed in cross-cultural research, yet, modifications made to cognitive interviews as prescribed in this paper may allow for further insight into cultural and linguistic disparities afforded via this approach.

During the course of evaluating the products obtained from protocol analysis in response to survey items, concerns with validity may need to be replaced with an emphasis on trustworthiness and authenticity of processes. Though it has been noted that the value of experimental method lies in its capacity to utilize “rigorous experimental methods” extracted from “objective, quantifiable data” (Conrad & Blair, 1996, p. 8), qualitative research has sufficiently evidenced its capacity as an equally valid and rigorous construct, specifically in regards to data analysis (see Creswell, 2007; Glasser & Strauss, 1967; Habermas, 1990).
Therefore, in contrast to calls for assessment of “validity and equivalence of results when different protocols are tailored to address culturally specific issues that may be manifested in one country but not another” (Thrasher et al., 2011, p. 456), researchers may find it more appropriate to rely upon guidelines for qualitative research which emphasize representativeness of results as a measure of authenticity in future work with CI. This approach allows for the differences from dissimilar cultural contexts to be respected and reviewed for what they are, in contrast with an approach which seeks a certain level of homogeneity among responses to survey items.

Currently, a few researchers in survey methods acknowledge the importance of following methods of qualitative research in thinking about products of protocol analysis and illustrate how reliance on such methods results in the methodological rigor desired by survey researchers (Chan & Pan, 2011; Ridolfo & Schoua-Glusberg, 2011). However, many are yet to demonstrate confidence in this approach.

**Conclusion**

Cognitive interviewing holds much promise for pretesting in cross-cultural survey research. However, as has been shown, debates surrounding the effectiveness of the method for culturally and linguistically diverse populations
have yet to reap the rewards transforming this qualitative tool to fully access a range of error sources within cross-cultural contexts. Speakers of multiple languages reflect the inextricable nature of language and culture (Halliday, 1980; Vygotsky, 1981). As such, any attempt to assess the ways in which any of these multilingual individuals approach survey items, taps not only into their language use, but also taps into their cultural appropriations of words and concepts. Understanding this phenomenon is critical if CI is to truly reflect a sociocultural (and interpretive) approach from the onset of data collection, throughout the process of analysis, and during the interpretation of protocols.

Based on our foregoing discussion, researchers should address the following when undertaking cross-cultural cognitive interviewing:

1. Aid in the clarification of terms surrounding CI in the literature by using ‘CI’ to refer to the broader cognitive interviewing process that includes think-alouds and verbal probing, by using the term ‘think-aloud’ to refer to concurrent verbal reports and the term ‘verbal probing’ to refer to retrospective verbal reports;

2. Use retrospective think-alouds to place as much emphasis on sources of errors revealed in survey items as is done for the identification of errors in concurrent think-alouds;

3. Attend to the sources of error based on the relationships among the
language and cultural competence of the investigator, cultural and linguistic connotations of survey items, and historical and current geographical, language and cultural background of participants to bring about trustworthiness in the instrument validation process;

4. As much as possible, use pre-established surveys to assess bias because of their potential for revealing nuances arises from participants’ social and contextual uses of language.

It is expected that future explorations in cross-cultural research will reflect more concerted efforts to attend to the sociocultural variables representative of the respondents involved. Future research is needed to propose specific recommendations for pretesting via CI within a sociocultural perspective, specifically for students and individuals whose first language is not English. Propositions concerning how sociocultural approaches to CI would inform the use of data and enhance quality and meaningfulness of the resulting questionnaire items would also be necessary. This discussion represents a modest contribution to and extension of steps in this direction.
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Creswell, J. (2007). Qualitative inquiry and research design: Choosing among


and written language: Impact on schools (pp. 7-19). International Reading Association & National Council of Teachers of English.


Patton, M.Q. (2002). *Qualitative research and evaluation methods*. Thousand


Norm was a doctoral student at Pitt who taught Jim how to be a faculty member.
Abstract

To be a member of the literacy professoriate it is expected that one should have undertaken a program of preparation that leads to a breadth and depth of professional knowledge so as to support a career of undertaking impactful scholarship along with the training of future generations of literacy teachers, specialists, and often professors. Yet, while current members of the professoriate as well as those individuals preparing for a life in the academy may have undergone or are undertaking what appears to be a rigorous program of study, the historical and the historiographic foundations have been in far too many cases overlooked. This chapter discusses the problem and offers suggestions.
Let us begin this article with a premise. A field only becomes a profession or a true discipline when its membership is fully cognizant of its past and is able to evaluate critically its present and its possible futures based on a foundation afforded by a knowledge of theories from and research from/of its past. In meeting such a mandate we logically focus on the case of individual members of the professional elite, which includes the professoriate.

Now this stance leads to a question. Do members of the field of Literacy, and particularly the members of the professoriate and those in preparation for membership in the professoriate, value and possess a strong foundational knowledge of the history of reading/literacy and reading/literacy pedagogy or is the membership, when taken as a whole, basically ahistorical?

How might you judge this question? We suggest that you review the related literature sections of a few dozen articles found in the recent issues of our most prestigious literacy-oriented journals and yearbooks. Do you see a careful analysis of works crossing the decades? Do you see regularly included the progression of knowledge on a respective topic as built across a century and a quarter of reading research and theory? While the statement that there is nothing new to the field is to be questioned, Dr. Isabel Beck once wisely pointed out that the field regularly evolves not unlike the wheel on an ox cart to that of a wheel on a Conestoga wagon to the first pneumatic tire on to a ultra-high performance all-season radial tire. Evolvement is all but a fundamental law of scholarship. That very evolvement underlies
all that is posited to be new or cutting edge and an analytical understanding permits the scholarly analysis of the theory or data being put forward. Do we see such an undertaking by the writers of these articles... yes, but all too infrequently.

Let’s say that you accept our premise and you also accept our positionality if only begrudgingly. That leads to another question. What is the responsibility of the professoriate in leading the field away from an ahistorical culture to one that fully embraces and participates in the creation of new knowledge through an in-depth understanding of our past?

**What are the Standards?**

The first step in any analysis would be to examine the position taken by the reading field’s largest professional association, that being the International Literacy Association (ILA). For decades now, the ILA has supported a comprehensive set of standards that serve as a basis for the knowledge, skills, and dispositions for literacy professionals serving in or training individuals to serve in the K-12 environment.

From the perspective of this paper we focus on the Standard 1: Foundational Knowledge associated with the history of the field as such applies to Teacher Educators...those individuals charged with preparing entry-level teachers, reading specialists, and future members of the professoriate.
A review of the substandard pertaining to the history of the field from the standards released in 2010 suggest that the ILA supported the need for teacher educators to have a historical perspective.

ILA Standards: Teacher Educator (2010)

- **Standard 1: Foundational Knowledge**
  - Teacher Educator Candidates understand the theoretical and evidence-based foundations of reading and writing processes and instruction.
    - 1.2: Understand the historically shared knowledge of the profession and changes over time in the perceptions of reading and writing development, processes, and components.
      - Analyze historically shared knowledge in reading and writing scholarship and explain its role in an evolving professional knowledge base.
      - Reevaluate the relevance of historically shared knowledge in meeting traditional print, digital, and online reading education goals.

Ironically nowhere in the document is there a suggestion that the candidates or their doctorly prepared instructors should possess even a passing competency in historiography such that they can actually understand, analyze, or let alone reevaluate the foundational knowledge, pedagogies, theories, and research upon which the field has been built across the centuries. We do not see any suggestion that having experience in actually undertaking literacy history is at all required in meeting this standard. Still, the bottom line is that the 2010 ILA Standard 1.2 did address the history of the field and provided a requirement at least at a basic level.
Let us fast forward to the standards released in 2017. As is demonstrated below, literacy history is clearly supported at the broadest level in ILA Standards for the Preparation of Literacy Professionals 2017.

- Candidates demonstrate knowledge of the theoretical, historical, and evidence-based foundations of literacy and language and the ways in which they interrelate and the role of literacy professionals in schools.
- Foundational literacy knowledge is at the core of preparing individuals for roles in the literacy profession and encompasses the major theories, concepts, research, and practice that share a consensus of acceptance in the field. Individuals who enter the literacy profession should understand the historically shared knowledge and develop the capacity to act on that knowledge responsibly.
- Components of the Foundational Knowledge Standard establish expectations related to theoretical, conceptual, historical, and pedagogical knowledge.

While this inclusion of the historical perspective in the 2017 standards document is of importance to the field, there is a glaring void in Standard 1: Foundational Knowledge for Teachers Educators. Let us examine this standard.

**STANDARD 1: Foundational Knowledge**

Effective teacher educators know and can demonstrate the following:

- Understanding of the theoretical and evidence-based foundations of language acquisition and literacy for all learners, in varied contexts

- Understanding of the theoretical and evidence-based foundations of writing development, the writing processes, and the integral connections between reading and writing for all learners, in varied contexts, and across grade levels and disciplinary domains

- Understanding of the theoretical and evidence-based foundations of language, its development, and the ways in which it influences literacy development for all learners, in varied contexts, and across grade levels and disciplinary domains

- Understanding of the theory and research related to preparing literacy professionals

Neither future members of the teacher education professoriate or current members of the literacy professoriate are expected to have advanced knowledge, competencies, or even positive dispositions associated with the historical perspective. Perhaps the term “foundations”
as found throughout the criteria implies the historical perspective... perhaps not. In the very least there is a vagueness that allows members of the professoriate to have a limited knowledge of our history, if not an ahistorical perspective.

**Lay of the Land**

And so, there are some national standards, even if only lip service has been provided in the generations of ILA standards documents. How are these standards met by programs preparing future members of the professoriate? We surmise that in most cases this is only accomplished by default.

Still there are some programs that deliver courses in the history of the field so that at least some doctoral students can gain knowledge and, we hope, appreciation of the road down which the field has journeyed.

Logically it might be now asked what institutions provide doctoral courses focusing on the history of reading. An answer that reflects the current 2019 lay of the land is not possible; however, the now defunct History of Reading Special Interest Group of the IRA/ILA created an archive of course outlines on the topic. This archive has been retrieved and augmented by the History of Reading Innovative Learning Groups of the Literacy Research Association (LRA). Hence, we are able to provide a listing of courses and the hosting institutions that have delivered over the years
Table One
Institutions Having Offered History of Reading Courses

<table>
<thead>
<tr>
<th>Institution</th>
<th>Course Title</th>
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<tbody>
<tr>
<td>University of Nevada, Las Vegas</td>
<td>Historical Foundations of Literacy Research and Instruction</td>
</tr>
<tr>
<td>SUNY, Albany</td>
<td>Histories of Literacies</td>
</tr>
<tr>
<td>Brown University</td>
<td>The History of Print Culture in America</td>
</tr>
<tr>
<td>University of Wyoming</td>
<td>The Histories of Literacies</td>
</tr>
<tr>
<td>Brigham Young University</td>
<td>Historical Foundations</td>
</tr>
<tr>
<td>University of Michigan</td>
<td>Reading in America, 1776-Present</td>
</tr>
<tr>
<td>University of Pittsburgh</td>
<td>History of Reading Research and Instruction</td>
</tr>
<tr>
<td>University of Texas, Austin</td>
<td>The History of American Reading Instruction</td>
</tr>
<tr>
<td>University of Chicago</td>
<td>A History of Reading</td>
</tr>
<tr>
<td>University of South Florida</td>
<td>History and Models of Reading</td>
</tr>
<tr>
<td>Michigan State University</td>
<td>History of Literacy Research &amp; Instruction</td>
</tr>
<tr>
<td></td>
<td>History of Reading</td>
</tr>
<tr>
<td>University of Delaware</td>
<td>Literacy in Historical perspective</td>
</tr>
<tr>
<td>University of Kansas</td>
<td>Literacy and Culture in America</td>
</tr>
<tr>
<td>Sam Houston State University</td>
<td>History of Reading</td>
</tr>
</tbody>
</table>

While we do not suppose that this list is all encompassing, it must be pointed out that courses are not necessarily required of all students, may be offered on an intermittent basis, and may only exist as long as a particular individual resides at an institution or is even alive. Still we have examples that can be obtained by contacting the leadership of the LRA History of Reading ICG.

If but a few doctoral students take a course in the field’s history, as is suggested by what appears to be a limited number of courses that have been offered over the years…and particularly if this limited number of courses is compared to the ever-expanding number of doctoral programs focusing on literacy…and if historical content and historiography as well is relegated to the first-class session or two of literacy doctoral courses…and if historiography
takes a backseat to more trendy methodologies as covered in research courses... then we have the expected outcome of being part of a field that is with a paltry knowledge of the foundations that under grid all we do and quite likely suggests that a large proportion of the professoriate operates from an ahistorical perspective.

Furthermore, given that this situation is not a new one, it is equally likely there exists a lack of established professors with the knowledge, the commitment, and the desire necessary to teach such a course.

**With What Components of Our History Should ALL Teacher Educators be Required to Demonstrate Knowledge?**

It goes without saying that to promote an understanding and a perspective of valuing of our shared history, doctoral students must encounter both primary and secondary resources and have experiences with historiography that go well beyond a historical show-and-tell that often makes up the first session of many doctoral level courses. Hence, let us now turn to a set of categories as well as respective resources that might serve as Foundational Knowledge for members of the professoriate (although certainly not the only resource options available).

In doing so we must first consider the work of Nila Banton Smith. It has been said that no one did more for the field of psychology in the first half of the 20th century, nor held the
field back more so in the second half of the 20th century than Sigmund Freud. In many ways, the same can be said of Smith’s historical works.

There was a time when members of the professoriate would point to the historical work of Nila Banton Smith as the historical touchstone of the field. Smith began her work (1934a, 1934b, 1965, 1986, 2002) with a short gloss of the history of reading and instruction from beyond the nation’s borders. Yet the book focuses primarily on the methods, materials, and personalities of teaching reading in the U.S. from the earliest days of the colonies up through the 1960s. Unlike many other texts, Smith crosses borders to go beyond the realm of beginning reading as she examines secondary school reading, college reading, and adult literacy, although admittedly to a lesser extent than elementary reading instruction and research.

As a dissertation undertaken at Columbia University during the fourth decade of the 20th century, it was indeed a tour de force (Smith, 1934a, 1934b). With its reissuance, the text (Smith, 1965), revised to reflect Smith’s then current professional philosophy and values, achieved its place as the premier work on the topic in part through the bully pulpit provided by its sponsorship by the publications arm of the International Reading Association. Then, as two later editions (Smith 1986, 2002) were released, it achieved a status as a classic. In reality, it had to be judged as a product of years gone by. Today it does remain as a text that should be read critically by each current and future member of the professoriate. Yet if any version of American Reading Instruction serves as the only text on history of the field to
be read, the breadth and depth of an individual’s historical weltanschauung will be sadly lacking given other historical works that are often overlooked as a result of Smith’s bully pulpit.

Three works exist that also provide a March of Time orientation that are much like Smith’s works. And like American Reading Instruction these would remind most readers of the fundamental design of an eight-grade history book from the 1960s. These March of Time works are now covered in turn.


This dissertation work that has been all but lost to the times begins by covering the earliest of the primers and the New England Primer. Reeder then moves through a description and discussion of the horn-book, the battledore, and the sampler. This content is followed in turn by the influences and works of Noah Webster and then reading materials from across the 1800s, including those by/from McGuffey, Worcester, Cobb and others. He then shifts gears to discuss methods of teaching reading including the alphabet method, the spelling method, the word method, phonics, phonetics (the rational method), and mixed methods. [also see R. R. Reeder, 1900b. *The Historical development of school readers and of method in teaching reading*. Columbia University Contributions to Philosophy, Psychology and Education, 8 (2). New York, NY: Macmillan.]

This text is an abridgement of Lamport’s dissertation (1935) of the same title. It covers the methods of teaching reading and the reading materials going back to the Greeks and Romans. He tracks approaches through European history, yet the predominant discussion focuses on the United States from the colonial period up until the beginning of the 20th century. As such, he discusses the impact of theories and methods imported from Europe and the birth and maturity of American approaches to beginning reading. [also see Lamport, H. B. (1935). A history of the teaching of beginning reading. (Doctoral dissertation) Retrieved from ProQuest LLC. (Publication # T-09249)]


Mathews begins his study with the development of written language in the Middle East and then journeys on to Greece and the Roman civilization. He then moves forward in time to discuss the teaching of beginning reading, particularly the approaches developed and or borrowed, in Germany, France, and England. His coverage of the materials and approaches utilized in the U.S. move across history from the earliest of Colonial Times through to the start of the 20th century. While Mathews discusses events and pedagogies of the first half of the 20th century, this coverage is not to the depth of the texts that precedes it.

It is of interest that Smith never acknowledges any of these three texts in her editions or in her articles that serve as abstracts of American Reading Instruction. Hence, it would be a logical action for doctoral students to read one or more of these works at the same time one would first encounter American Reading Instruction. Those members of the professoriate who have
yet to encounter these works would find them reading them to be most appropriate professional development. In reading each source it is important to be cognizant of the different philosophical perspectives taken by each of these four authors. Reeder, Lamport, and Mathews each side with a different method of teaching reading.

**The World Beyond Nila Banton Smith**

What then should be the corpus of works that should be part of the initial training of doctoral students? Given the expansive corpus of texts and articles on the history of literacy that are available for study, recommending a specific list for this population of students is problematic. No matter what is selected to be read it remains clear is that members of the professoriate must certainly maintain across the duration of one’s career a personal program of professional development pertaining to history as well as historiography.

Perhaps it is best to approach the question not through individual texts and articles but rather through a categorization scheme in which students should have sampled at least one, if not more, texts and several articles from each classification across the period of time enrolled in coursework. Then, throughout an individual’s time in the professoriate, various categories should be visited regularly to fill in the gaps of knowledge or expand one’s perspectives and appreciations.
Let us then utilize a categorical scheme that at least for the purpose of argument serves as a structure for a corpus of texts available for promoting a historical foundation for each neophyte to the field. We offer a scheme with eight categories along with exemplar books for consideration that admittedly serve as a straw man and so being open to reconception, revision, or even rejection. Table three presents each category along with several exemplar texts by various authors.

Table 3
Historical Text Categories and Exemplars

<table>
<thead>
<tr>
<th>Category</th>
<th>Exemplars</th>
</tr>
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<tbody>
<tr>
<td><strong>Premier Historians of the Field</strong></td>
<td>Harvey Graff (1979) ... The Literacy Myth</td>
</tr>
<tr>
<td></td>
<td>Carl Kaestle (1991) ... Literacy in the United States:</td>
</tr>
<tr>
<td></td>
<td>Readers and Reading since 1880</td>
</tr>
<tr>
<td></td>
<td>E. Jennifer Monaghan (2005) ... Learning to Read and Write in Colonial America</td>
</tr>
<tr>
<td></td>
<td>Richard L. Venezky (1999) ... The American Way of Spelling</td>
</tr>
<tr>
<td><strong>Pre1900 Pioneers</strong></td>
<td>E. Jennifer Monaghan (1983) ... A Common Heritage:</td>
</tr>
<tr>
<td></td>
<td>Noah Webster’s Blue-Back Speller</td>
</tr>
<tr>
<td></td>
<td>Harlow Giles Unger (1998) ... The Life and Times of Webster: An American Patriot</td>
</tr>
<tr>
<td></td>
<td>Delores Sullivan (1994) ... William Holmes McGuffey:</td>
</tr>
<tr>
<td></td>
<td>Schoolmaster to the Nation</td>
</tr>
<tr>
<td></td>
<td>Harvey C. Minnich (1936) ... William Holmes McGuffey and His Readers</td>
</tr>
<tr>
<td><strong>Post 1900 Reading Pioneers</strong></td>
<td>Susan Israel &amp; E. Jennifer Monaghan (Eds.) (2007) ...</td>
</tr>
<tr>
<td></td>
<td>Shaping the Field: The Impact of Early Reading Pioneers, Scientific Research, and Progressive Ideas</td>
</tr>
<tr>
<td></td>
<td>Jennifer A. Stevenson (Ed.)... William S. Gray:</td>
</tr>
<tr>
<td></td>
<td>Teacher, Scholar, Leader</td>
</tr>
<tr>
<td></td>
<td>Research Retrospective, 1881-1941</td>
</tr>
</tbody>
</table>
Coverage of Reading Approaches

Maurice Harrison. (1964). The Story of the Initial Teaching Alphabet

Crossing Content Borders

Clifton Johnson. (1963). Old-Time Schools and School-books
John Nietz. (1961). Old Textbooks

Crossing Cultural Borders

R. Coronado. (2013). A world not to come: A history of Latino writing and print culture
K. Hirschler. (2012). The written word in the Medieval Arabic lands: A social and cultural history of reading practices
E. McHenry. (2002). Forgotten readers: Recovering the lost history of African American literary societies

History of Reading

Guglielmo Cavallo & Roger Chartier (1995). A History of Reading in the West
Lyons, M. (2010). A History of Reading and Writing in the Western World

History of the Book

Is Knowing Something About the History of Literacy the Endpoint or Should all Doctoral Students Be Required to Do History?

A simple grand tour of the history of literacy through an in-depth course, even with a traditional research paper, is an important step in the inculcation of a doctoral student/candidate into the professoriate. Yet we believe that such is but a first step. These individuals should be exposed to undertaking one or more projects employing the methods of historiography (see Stahl & Hartman, 2011). What follows is a list of possible topics that focus on era-oriented work, biographical accounts, and near-by history (Stahl, Hynd, & Henk, 1986).

Table Three
Avenues for Chronicling and Researching History of Literacy

- Judging the impact of historical events
- Focusing on an era
- Assessing the impact of influential individuals
- Consulting the experienced (oral/life history)
- Tracing the changes in materials
- Observing changes across multiple editions of texts
- Judging innovations and movements
- Appraising elements of instrumentation and assessment
- Focusing on an institution through near-by history
- Tracking and evaluating an idea or problem
- Doing history and creating and preserving a legacy

How Can We Promote the Historical Moment and Historiography?

While much of this article has focused on what might constitute a traditional course, the historical moment and the practice of historiography is not limited to a classroom
experience. A second suggestion would require a change in the time-honored right-of-

passage for the preparation of future members of the professoriate. For much of the field’s
history, the doctoral student, after completing a program of coursework, crossed the

academic bridge to being classified a doctoral candidate through a rigorous examination

process. While the nature of the examination may have varied from school to school, the

fundamental right-of-passage has been a commonality for all students. The process of the

candidacy examination reflects a type of rigor reaching back across the past century to a
time when the knowledge base of the field was far more bounded than for which we find it to
be today. Hence, short of a degree of academic pomp and faculty control, the process must
be questioned as to whether it provides any culminating value for the student or valid

assessment for the coursework phase of the doctorate. It cannot measure the breadth of

knowledge associated with the field and likely can measure but a the narrow depth of

knowledge and competency.

Replace the doctoral comprehensive examinations with portfolios that demonstrate

one’s scholarly readiness for entry into the candidacy stage.

- As the neophyte enters the doctoral process, she or he is presented the goals
  (SLOs) that align with the program’s conceptual framework.

- A portfolio plan is developed, although it can and should be revised along the
  student’s doctoral progression.

- At the annual portfolio review the future candidate and his/her advisor
demonstrate jointly to the local doctoral community the depth and breadth of
knowledge as well as competencies mastered by the candidate across the past 12 months through classes, elbow learning, and personal learning.

- One must demonstrate knowledge of the field’s history and a competency in histography.

We close this work with a simple proposition. Until we as a field embrace and value the History of Literacy we cannot claim to be a profession. This is particularly important as we continue to expand the field of literacy research into new areas of study. Connecting emerging scholars of different perspectives and those who are at different stages of their careers to our history can help our profession avoid historical and empirical myopia. You have a choice.
References


Section Two: Tokens of Thanks for James R. King
Letter to Jim

by

Marino C. Alvarez

Marino was Jim’s fellow doctoral student at West Virginia University.
Jim and I were doctoral students at West Virginia University’s Reading Center. At that time, we had the largest contingent of doctoral students ever in the Reading Program: fifteen as I recollect. Dr. Thomas Hatcher was the Department Head and he was an electrifying individual. His guidance served all of us through the program. Our faculty were Dr. John Helfeldt, Dr. Rick Erickson, Dr. Marilyn Fairbanks, Dr. Martin Saltz, Dr. Pat Smith, and Dr. Jere Rabinovich. Professor Rabinovich was Jim’s major advisor for his dissertation. As soon as Jim finished defending his dissertation, Jere announced she was leaving to pursue a medical degree and become a physician. No doubt that Jim played a role to her departure. When Jim returned from visiting elementary classrooms, he would describe his experiences with the “little ankle biters.” Jim is a tall person, so I could imagine these little children gathering around him, and he, probably intentionally, stepping on them. Little innocent, unsuspecting children, strewn across the floor. Crushed under a size 16 shoe.

After graduation, many of us in the doctoral program had the opportunity to see each other frequently at literacy meetings throughout the country and outside the USA. College Reading Association, National Reading Conference, American Reading Conference, American Educational Research Association, International Reading Association, and various European Conferences. It was always interesting to see Jim at these meetings and to see our former graduate students. Margarite Gillis, Jerry Cooper, Bill Henk, Clyde Colwell, and others. Jim would attend NRC and meet Norm Stahl. Norm was attending the University of Pittsburgh for his doctoral studies during the same time we were at WVU. It is my contention that Norm always wanted to be a WVU person, and that the closest he could come to being one was to associate with Jim. Jim and Norm were very visible at NRC Conferences putting on skits and engaging attendees in a variety of mind-numbing situations.

My wife, Vicki, and son, Christopher always looked forward to seeing Jim. He once stayed overnight in our home in Nashville while on his way to Texas Woman’s University where he was a member of the faculty. He watched our son grow through the years when we attended literacy conferences; especially when NRC and ARF were in Florida. Jim has, and will always, be a part of our family. I have fond remembrances of him as a fellow graduate student, a fine scholar and teacher, and a trusted friend. And, as you can gather from this early photograph, we think of him often.

Marino C. Alvarez, Ed.D.
Professor Emeritus
Tennessee State University
Mary Alice was Jim’s colleague at the University of South Florida.
Jim King

A home full of children, poverty, need
Into school where he became the most curious, secretly wanting to learn the most
Loving books; so many books, so many ideas
Mental escape to worlds beyond a young boy's imagination
Constant movement, talk, smiles, and laughter
The hard times of the Vietnam war and finding friends seeking peace
Denying self to fit in, but never denying the search
A life of college to classroom in an endless spiral, reveling in the process
Always thrilled with learning, worried when it didn’t occur
Moving across flatlands, mountains, rivers, and landing near the sea
A final escape from denial, leading to love and new understanding of fulfillments
International travels, searching for deeper and deeper knowledge
Dr. Good Manners, rigid with ethics and principles, full of fancy words and phrases
Always looking for the right theory
Mr. Relaxation and hospitality at home
Caring for others and willing to step out and take time to help those around him with needs
With love, just pure love for humanity
Perfection in home care, beauty, and comfort
The devotion to hard work from early in the morning until late at night when needed
Able to escape fully and purely when the opportunities came along
Ceaseless reading, writing, studying, listening, educating, reflecting, learning
And expecting the same of friends and colleagues
Available for a good talk, ready to offer advice but hoping it will be requested
Lifelong friends and family members who never miss a chance for togetherness
Working with teachers, schools, principals, preservice, doctoral students
Always with determination to provide support to find their best identity and work
Fascination and respect for culture, language, place, and the search of life
Enthusiasm, resolve, determination, courage, persistence, all with deep care
Taking next steps that will lead to sharing all of these treasures further across the world
Always with love

- Mary Alice Barksdale
Sonnet for Jim King

by

Susan V. Bennett

Susan Bennett was Jim’s doctoral student at the University of South Florida.
A Sonnet for Jim King

By

Susan V. Bennett

When I think of Jim King, I see your smile
Is this smile facetious? Satirical?
Clever and wit stretches over a mile
With Jim, there’s never a moment of dull

Doctoral students listen on the edge
The wisdom, and bull, like books on a shelf
We share woes; you advise us off the ledge
We all heard you say, get over yourself

For those, like me, not doc students of yours
In class, at lunch, or LRA, or bars,
Waving us in with open arms and doors
Beautiful tangled narratives, memoirs

Fly free, jump into poignant odyssey
May your retirement fill you with glee
Margaret was Jim’s doctoral student at the University of South Florida.
Real Learning

Decluttering guru, Marie Kondo, has an appropriately streamlined philosophy for helping us organize our material possessions. She says we are to keep only those things which ‘spark joy’ or are absolutely necessary. I have only recently been introduced to this craze ‘for all things Kondo’, but in thinking about the impact of Dr. King on my life, I realized a direct connection...

Since graduating from USF in 2015, I have moved continents and lived in three different houses. As we all know, four years of doctoral study accumulates a lot of paper and with each move, my hand has hovered over different folders as I ponder their relevance to my life now. A few folders have been recycled and some have undergone serious ‘editing’, however there is one folder over which my hand never hovered – a folder labeled ‘Dr. King’s dissertation notes’. Inside this folder is a print out of my dissertation complete with track changes and comments made by Dr. King four years ago. This folder has remained in tact because the comments fulfill Marie Kondo’s creed – they make me smile and remind me of what is truly necessary in learning. There is one particular comment that gets straight to the heart of a problem I encounter in my life now as a literacy teacher in a public school. In the context of claims I make about drama enhancing comprehension, Dr. King urges me to expand on my definition of ‘comprehension’, and then cautions me with an indictment that captures the essence of education policy today. He writes that to expand on notions of comprehension “won’t be popular with the “test set” but they left real learning long ago” (italics mine). Dr. King – sadly, this observation remains spine chillingly true and so it spurs me to do what is necessary to reinstate ‘real learning’ in my classes.

Finally, I simply wish to say an additional “thank you Dr. King” for those afternoons when I tentatively began my dissertation and you walked me through the history of literacy in the United States. Those sessions introduced me to the names, significant publications and major events I needed to know about and in so doing you cluttered my life with humour, knowledge and an experience of real learning. Those memories will never be edited.

Margaret Branscombe
Personal Reflection

by

Roger Brindley

Roger was Jim’s colleague at the University of South Florida.
I am sharing a personal reflection in this email and will reference the attached manuscript that Jim wrote in the spring of 2000. I had the pleasure of assisting with the methodology and references but this was his work and reflects his passions and ethics simultaneously. He and I went on to co-author a book chapter in 2001:


Writing *Getting Ready for Benjamin* taught me so much about Jim’s commitment and dedication to the less enfranchised and less understood. Not only children in the classroom, but across education and indeed, across society. Working alongside Jim also allowed me to comprehend his personal ways of knowing. We focused on issues of inclusion for the gay elementary school student in getting *Ready for Benjamin*. At the time, Jim’s thinking and writing was seen as critical, removed from the core of the literature, and even “fringe.” It speaks volumes that he could foresee the issues that haunted society, and indeed still do, a decade before his research focus became mainstream, and dare I say essential.

Jim was a great mentor for me. His desire to understand the individual and to chronicle how we each understand our lives resonated with my training in phenomenology and my subjective ontologies. He would wax lyrically about Foucault while I muttered about von Glasersfeld’s “perturbations.” He would highlight the poignancy and the contemporary significance of Donna Alverman while I would ramble on aimlessly about Marilyn Cochran-Smith’s notions of dissonance. It wasn’t a fair fight! Still, I learned so much. I learned not to bullshit. Be authentic . . . be organic. Be focused and get to what’s important. If your research isn’t reaching and then helping society better understand and address an educational dilemma, then what are you doing?

Be true to your research sample. Promote their voices and let them speak loudly through your writing. Bring a voice to the misunderstood, the uninvited, the ignored, the politically manipulated and co-opted, and worst of all the assaulted and abused. Be kind. Care for others. Be considerate. Speak quietly but allow your words to have weight (sorry Jim but I am still working on that one!). Let your professional behaviors be a natural extension of who you are – in Jim’s case a kind, dignified, honest and inclusive heart combined with a mind that was a sharp as a whip and would call out the callous, ignorant and bigoted nature of society defiantly and in an articulate and precise manner. Jim can say in a focused and defined 50 words what I need 150 words to express in rough approximation.

Jim shared a manuscript titled *Broadening Worldview or Too Risky and Taboo?: The Impact of Explicit Gay and Lesbian Content on an Undergraduate Elementary Education Seminar* with me that speaks to this beautifully. In this piece Jim lays himself vulnerable. He takes on the issue of sexual orientation in the elementary school directly and the failure of educators to do little more than window dressing, little more than lip service. His references evoke the greatest writers in this field of this generation, and he records his disruption of the belief systems of 30 preservice teachers. Perhaps less disruption and more poke them in the eye! His activities are laced with hard realities (God bless
Matthew Shepard), and through his students’ voices he lays out the tension, the strain and the conflict presented by these scenarios that Jim knew must be interrogated in the harsh light of day. He expects teachers to expect more of themselves and cajoles them into action. He challenges their selective behaviors and privileged excuses. Teacher educators are chastised. How dare we sit in the ivory tower, far from the realities of the classroom and pontificate? Bravo Jim!

Thank you, Jim. I will treasure my professional and personal relationship with you. I hope that in my demeanor, my self-reflection, my compassion for others, my healthy skepticism and critique of systems and structures in society, and my care and kindness that I can be just like you when I grow up. And I haven’t even discussed that wicked laugh and twisted sense of humor . . .

Roger
Dear Jim ... Letter to a Mentor and Friend

by

Linda Shuford Evans

Linda was Jim’s colleague at the University of South Florida.
Dear Jim...
Letter to a Mentor and Friend

Dear Jim,

A couple of weeks ago, I received an email, forwarded from a friend who was a former advisee. The email said that you were retiring and it was an invitation to contribute to a book that was being created in your honor. The email called it a Festschrift...huh? As a language person, I recognized the “fest” part of it, and the attached flyer informed me that the term literally translates to “party-writing” and might be translated as “celebration publication.” I definitely wanted to contribute to this party-writing to celebrate your career and retirement, so I read the flyer top to bottom four or five times because the rule follower in me wanted to make sure that I would submit something within the bounds of what was being asked for on this important occasion. Then I started to write.

As I began to write, I went waaayyyy back in my memories to try to figure out exactly when we had met, and then to recall interesting occasions or situations that exemplified who you were to me as a mentor and friend over all the years that we’ve known each other. At the same time, I reflected on my own career as an educator, both before I knew you and then in the years since. I cast about for a format...hmmm. Maybe a bulleted list of “what I learned from Jim King”? Or an autoethnography that reflected your impact in my development as an educator? A simple narrative pointing out how amazing you are? The wandering around in my head and on my screen for an organizing theme or an appropriate format lasted a few days, but pages later something didn’t feel quite right. It was okay in a general “thanks for being you and this is what you’ve meant to my life” kind of way – a telling – but I was casting about for a way of adding a showing, a way to more authentically relay my thoughts about you, me, and us in the scope of your career as I experienced it.

So I woke up early this morning, once again thinking about this project and what I wanted it to be. Sipping my coffee in the quiet of my home in yankeeland, I opened my laptop and reread the flyer one more time. It was then that I had the slowly dawning realization that the flyer reminded me a lot of what I had experienced in working with you over the years. The flyer gave definitions, guidelines, and examples, and expressed encouragement and enthusiasm, and also contained one bullet that repeatedly jumped out at me – “Almost anything goes!” During all the many times we worked together over the years in evolving roles, I remember you giving suggestions, teaching, providing affirmations, expressing enthusiasm, and asking hard questions, but at the end of it all, I always felt heard, supported, and challenged to honor myself and find my own way. It was never that just anything was fine, but you always encouraged me to have confidence in what I knew and in my ability to learn what I needed to know, and to always recognize that there were boxes to check and to observe, but that there were many fine occasions to not just wander outside the box, but to bust through it to create something authentic and meaningful. So in this letter I am liberating myself from the academic writing box to share snapshots of our shared experiences that have meant a lot to me in a way that feels more like me...
Jim, let me start by saying that you have a great smile, and there is a certain look you get on your face where you are smiling with both your mouth and your eyes, and your eyebrows go up so that your whole face lights up. I remember the first time I met you, though not exactly the year—maybe 1990? I had started taking some doctoral courses as a non-degree-seeking student just to see if I really wanted to pursue a PhD. I was from a working class family and was the first person in my family to ever go to college. I had never imagined getting a master’s degree when I started as an undergraduate (I didn’t even know what that was!) and here I was years later thinking I might want to pursue a PhD. However, not far into my coursework, my advisor, Don Neville, passed away, and I was left wondering how the heck to find a new advisor. I may have been a doctoral student but I was far from knowledgeable about how things worked in doctoral programs.

One of my professors suggested that I go and talk to this new professor just hired out of Texas Woman’s University. With my degrees in bilingual education and my varied teaching and consulting experiences, my background was a little different than most of my classmates’ and she seemed to think we might hit it off. So on that day I first met you, I remember knocking on your door, seeing you turn from your desk, say hello, and smile that amazing smile that immediately drew me in. I remember your listening to me tell you about myself, and then you telling me about yourself and your interests, and then you agreeing to be my advisor. But what I remember most is that after agreeing, you said to me (paraphrased but fairly accurate), “I just want you to know that I don’t do the ‘good little graduate student’ thing (making a patting motion with your hand). You can call me Jim, or King, or Dr. King...whatever works for you.” I told you that Jim would work just fine for me and that I appreciated not being treated like a good little graduate student.

The thing was, Jim, I knew that I definitely lacked an understanding of doctoral studies and the academy, and I knew that I had a lot more to learn about literacy teaching and learning, but I also felt like a grown up professional with standing in my field, so being treated so respectfully by you meant more to me than even I knew at that time. And that respect continued, even as you led me through the quagmire of learning curves and doubt and missteps that characterize any intensive learning experience.

This makes me think of a study I read recently, circulated by friends at Kennesaw State, that concluded that graduate school was bad for students’ mental health (Flaherty, 2018). The study found that graduate students were six times more likely to suffer from anxiety and depression than the general population, and suggested that environmental factors are responsible for much of this distress. I remember reading the study and feeling really angry. I thought about you as my advisor, my own time as a doctoral student, and about the many students that I went on to
advise and guide, and my overriding thought was, “Graduate studies don’t have to be that way”
coupled with a feeling of disgust for the faculty and departments in that study and that my
colleagues have experienced that either failed to provide support and perspective to students or
who actually accept or encourage a culture of ego and hierarchy among faculty. Ugh.

The thing is, Jim, that you never ever treated me that way. In fact, you made sure that I knew
that that kind of behavior was about the faculty member and not about me. Remember my
proposal defense? OK, back up a couple of years and remember how you taught me about this
thing called qualitative research? That research approach that the quant people considered
pseudo science at best and devoid of credibility at worst? Well, when you arrived at USF, there
were no courses in qualitative research designs of any kind, but you knew that one’s research
design and methods should be based on the questions they were trying to answer. You also
knew that my questions were worthy of investigation and could not answered by using the
quantitative methods I had learned about in my research design course. So you gave me books
and articles to read, worked with me on choosing my committee, and guided me in the planning
of a study using naturalistic inquiry (Lincoln & Guba, 1985).

During the proposal defense, my committee members were very positive, asked challenging but
reasonable questions, and expressed confidence that I had the knowledge to proceed with my
study...with the exception of one member. She was from another department, had not seemed
to read the proposal carefully and had not responded to several attempts on my part for
feedback before the defense. She was not familiar with naturalistic inquiry and did not see it as a
viable research paradigm, particularly for a doctoral student. And she was not kind in her
remarks.

In hindsight, I know that I handled her questions – actually more statements – rather poorly as I
was in total shock by her response to my work. I didn’t do the “defense” part of the proposal
defense very well, barely managing to hold myself together to respond to her. My committee
approved my proposal with some revisions to clarify/expand on my description of naturalistic
inquiry, and after all the signatures were gathered, you and I retreated to your office, where you
closed the door, turned to me and said, “Ok, let it out.” And boy, did I! Never before and not
ever since have I ever felt so humiliated, blindsided, disrespected, lorded over (and so many
more descriptors, but you get the idea) as that professor had made me feel. Even in my anger, I
understood my role in what had happened – assumptions I had made, explanations that were
not fully developed, and naiveté regarding what some professors see as their role for
dissertation work, among others – but it seemed clear to me that she didn’t do her job and then
took out her lack of understanding on me, rather than working with me to produce the strongest
study possible. Do you remember how you responded after my breakdown and tearful, angry
rant? You were supportive and practical. If you were angry about what had happened, you didn’t
let on; you let me own my anger. You handed me tissues and you quietly talked to me about
how to move forward. I revised my proposal, gave it to everyone to approve the changes, then
filled out a form to take that professor off my committee (which I fondly thought of as “kicking
her ass off my committee”) and filled the spot with someone who had a better understanding of
my study.
I don’t think I ever told you, Jim, what an impression this incident and, frankly, all of your work as my major professor and colleague had on my own actions and philosophies about mentoring my own students. You showed me how to be honest but kind, persistent but give space, and understand that the composition of a doctoral committee was critical for the safety and well-being of a doctoral student. Not to choose pushovers or professors who would just let things slide, but rather those who respected students, were willing to work on their behalf, and saw serving on a dissertation committee as an opportunity to learn, rather than a notch on their ego belts. I used the wisdom that I gained from you to help my own students choose their committee members carefully, and to also make decisions about which committees I would agree to serve on. I normally got along with everyone, but when approached about being a committee member, I always asked who else would be on the committee. I do remember a time when I told a student that I could not serve on her committee if she insisted on including a particular faculty member on the committee. It wasn’t because I thought I was better than the other faculty member; it was that I knew that there would be a conflict of philosophies between us and I did not want a doctoral student to be in the middle of that. I always thought that committees should be made up of faculty who all had expertise to contribute, were responsive, were capable of getting along with one another, and would place the success of the student at the center of the experience. I learned that from you, Jim, and it served me and my students well over decades of my own career.

Learning is not a product of schooling but the lifelong attempt to acquire it. - Albert Einstein -

You know what else you modeled for me, Jim? An openness to learning new things and valuing the expertise of your colleagues to broaden your own knowledge base. Remember when the ESOL Consent Decree was signed in 1990 and universities were to begin addressing the teaching of English learners in their teacher education courses? I was still a doctoral student (finally finishing in August 1997) but was also incoming president of Sunshine State TESOL, so I had knowledge of the field and had intensively studied the Consent Decree. There were only a few faculty in the College of Education with expertise in teaching English learners at that time, but there were a number who were interested in learning more, so you asked if I could loan some of my books and articles on the subject. I brought a box of materials that I thought would be helpful, and you and other colleagues took a thoughtful and determined approach to studying the field, which clearly demonstrated the humility to acknowledge that there will always be more to learn and a willingness to do whatever it takes to be a better teacher for kids and a better teacher educator.

I also remember bumping into you a lot in the Laptop Lounge after I had graduated and was hired as an assistant professor for the SLAIT (Second Language Acquisition/Instructional...
Technology) and ESOL/Foreign Language Education programs. I can’t remember exactly what you were learning to do, but I think it had something to do with using online communication tools in your courses, and I was really impressed by what you had created. I remember speaking with one of the Laptop Lounge folks after you left one day and they were super complimentary of what you were doing with technology in your courses.

What else do I want to tell you? Well, once I was hired to work with SLAIT, I was given the opportunity (or had it thrust upon me, depending on your perspective!) of serving on and chairing dissertation committees. Because of my experience with language and elementary education, you recommended me for dissertation committees in your department, and I and my students invited you to serve on SLAIT committees where students were utilizing qualitative research approaches or working with literacy issues. And do you know what it was like chairing a committee that included my own major professor? It was FANTASTIC! Do you know why? Because you continued to treat me as a colleague rather than a ‘good little graduate student’ and we continued to learn from one another. Not only that...you modeled for me what those relationships could be like, and I purposefully applied that to my own work with doc students.

So, kind of random but fond memories – There are a couple of short anecdotes that I admit that I may have repeated a time or two that always made me laugh. As a language person, I appreciate the turn of a phrase, linguistic anomalies or the erudite use of language (aka big words). My son Zach was born in February 1992, and I remember bringing him to campus when he was around a month old. I wheeled him toward your office and bumped into you in the hallway. After a hug, I introduced my son, who was awake and lying in the stroller looking up. You leaned over him, gave him a big smile, and said, “I just want you to know that you’ve fallen into some pretty great shit, kid.” He thought it was hysterical (or maybe it was just your smile?), and I received it as the highest of praise delivered in the most authentic fashion.

Another language-related memory that always made me laugh was when I would meet with one of my advisees who had previously met with you to get some guidance or feedback on their work. They seemed to cast about how to tell me about the meeting, stressing that you had been really nice and helpful, but clearly hemming and hawing about something. At some point, I would lean over my desk toward them, lower my voice conspiratorially, and say, “You know, sometimes even now when I meet with Jim, I come away and realize that I didn’t always understand everything he said.” Inevitably, they would get this gigantic look of relief on their faces and say, “Oh, thank you for that! I thought it was only me!” I would then go on to say that I always took detailed notes if I was working with you on something and would either ask for clarification or I would let it go but look it up when I got back to my office. I always appreciated the depth and breadth of your use of English and never stopped learning from you.

You know, the word ‘legacy’ is a big, heavy word, imbued with a feeling of grandeur. We often overreach or romanticize when we are honoring someone who is retiring. In the field of education, we all teach, and in higher education, we all teach, Legacy is not leaving something for people. It’s leaving something in people.

- Peter Strople -
mentor, and conduct research. This is the broad description of the job, and hopefully anyone who is retiring has done their job to a satisfactory degree. That would have made for a good life, right? Well, Jim, this is the place where I don’t just tell the story but I also show you a few examples of the legacy that you fostered in your career through this one student (me) from so very long ago.

I found the tree image below to be the perfect symbol for what I have tried to communicate in this letter to you, Jim. From the time I knocked on your door decades ago until the present time, you have had an impact on my life in ways that fostered my ability to have an impact on others. What greater legacy is there? You treated me with respect and caring, through many different times in my life, and I will be forever grateful to you. Your beautiful heart that shone through your beautiful smile helped me to know that enacting a pedagogy of love was not only okay, it was what I had to do and who I had to be. Your support and confidence in me not only helped me to be a good mentor to doctoral students, it also helped me to have the courage to take the radical path of leaving an R1 institution and going to a university where I could work directly in teacher education and create meaningful partnerships with schools, something really important to me. You not only made it okay to be me, you modeled the importance of being open, authentic, and fearless in finding my path, and I have done my best to pay that forward to my students and in my work over the past decades. I know that there were times over the years when I must have disappointed you – when I disappointed myself – but you never made me bear any disappointment you might have felt. You seemed to remain unwavering in your caring, and that helped me to be kinder to myself when I stumbled.

So I put together a small collection of wonderful people and initiatives that were rooted in the education and support that you gifted to me over many years. There are many more, but I just wanted to provide a snapshot of events that were important to me and that give an idea of how far your reach has been.

The great use of life is to spend it for something that will outlast it.
- William James -

We don’t accomplish anything in this world alone...and whatever happens is the result of the whole tapestry of one’s life and all the weavings of individual threads from one to another that creates something.
- Sandra Day O’Connor -
Robert Summers (USF PhD 2008) – Currently Assistant Provost for International and Exchange Programs, Global Engagement, State University of New York, Buffalo (https://international.buffalostate.edu/faculty/robert-h-summers)

Sister Angela Cresswell (USF PhD 2008) – Currently at Holy Family University, Professor of Spanish; Nazareth Academy High School Board of Trustees member; Director of the Family Center of Holy Family Province and Holy Family University, Philadelphia, PA.

Aylin Tekiner Tolu (USF PhD 2010) – Currently in the Faculty of Education at MEF University, Istanbul, Turkey. Focus is on English teacher education and technology innovations in teaching.

Derek Spalla (KSU MEd 2012) – Currently 5th grade teacher and instructional designer in Forsyth County, Georgia.

Jinny Yoonjin Kim (KSU MEd 2015) – Currently 2nd grade teacher in DeKalb County, Georgia and volunteer for the *Cuentos de Mi Vida* Multilingual Storysharing Project in Cherokee County, Georgia.

KSU MAT Students 2016 – Currently all working as ESOL teachers in Georgia. They came from previous non-education careers and I taught several of their courses and supervised them through their internships. We would occasionally hold class at my house, right around the corner from campus.

*Cuentos de Mi Vida* Multilingual Storysharing Project – A KSU/Cherokee County literacy partnership that I founded in 2013. Fifth grade (mostly Guatemalan) students meet after school and on one Saturday per month to create stories about their lives. They write in their most comfortable language, then represent their stories through multimedia formats – art, digital stories, music, writing – and visit KSU twice a year to share their stories with faculty and students. Added over the years - a parent component, *Cuentos Sábado* (Saturday *Cuentos*), and a *Cuentos* alumni mentorship program.
Sentipensante (Sensing/Thinking) Pedagogy: Educating for Wholeness, Social Justice, and Liberation by Laura I. Rendón (2014). I was introduced to this book in a social justice group at KSU; it perfectly described/expanded my educational philosophy. We later adopted it as reading for curriculum work and writing I led for Los Niños Primero, a non-profit preschool initiative for Latino children and parents (video of program).

The examples above are just that – examples. I could have listed many other students and projects influenced by your teaching and your support of my early and continued efforts, but I hope that this gives you a snapshot of the expansive influence that you have had on me and my work. And I have to add that that influence has longevity that carries over in the lives of others for many years and into the present day. I will close with a couple more examples that have most recently warmed my heart.

Eulises Avellaneda was admitted to SLAIT the last year I was at USF and I was his advisor. He came to me in the middle of the fall semester and told me that he was going to quit the program, that he wasn’t cut out for doctoral studies. I told him that what he was going through was normal and that I had a different view of him. I knew that he was from a small, rural town in Colombia and that no one in his family had ever gone to college before, much less left the country and advanced to doctoral studies. Sound familiar? Before leaving my office that day, he said he would think about what I had said. He stayed in the program, graduated in May 2016 (I stayed on as an outside committee member and wrote reference letters for his job applications), and is now an Assistant Professor of Education at the University of Houston. He recently surprised me this wall hanging that he had gotten during his travels to Peru and sent along a text by way of explanation as to why he had sent me a gift (right).

Do I believe that I deserve the enormous credit he gave me? Of course not, but...I did for him what you did for me – Helped him to understand that his feelings were normal, that he could succeed and that I saw a strength in him at that moment that he did not see nor feel in himself. He did all the hard work to succeed, and perhaps he would have stuck it out anyway, but having a caring, experienced person in your court when you are battling to discover your path and identity was an important gift from you to me, and I was able to pay it forward to him.
Finally, I want to introduce you to Faith. She was an undergraduate elementary education major who took the Language and Literacy course I taught (2nd of 3-course ESOL sequence) waaayyy back when. Even though I worked with many SLAIT students, I also continued to teach undergraduates, particularly from your department, because I had a background in elementary ed. Faith was always very engaged and interested, and she told me that she had decided that she wanted to work with English learners when she graduated. Well, she did one better and joined the Peace Corps, serving in Thailand. She wrote a blog, which I followed, and sent me this message and photo.

When Faith left the Peace Corps, she moved to Seattle and is now a Lead Program Manager for the Greater Seattle Bureau of Fearless Ideas. You should check out their website – super cool! I was wowed when I visited her a couple of years ago.

I finally went to Thailand a couple of years ago, and it truly is the land of smiles. A smile doesn’t always mean that everything is perfect, but the ones that draw me in are welcoming, fun, and an invitation to connect. Thank you, Jim, for the smiles you shared with me and for the smiles you helped make possible for me from places and people I could never have imagined all those decades ago when I was brave enough to knock on the office door of that new professor at USF.

I love you, Dr. Jim King, and I thank you for being part of my life – my mentor, my colleague, and my friend – for so many years. Welcome to the glories of retirement world!

**Besos y abrazos,**

**Linda**

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Yes, this is bread...in the shape of a heart. I’m Irish and bread is love (along with potatoes), so there you have it! XO


Tree clip art: <a href="http://cliparts.co/clipart/2688052">Clip art image by Cliparts.co</a>
You make my head hurt: My professor, mentor, and friend

by

AnnMarie Gunn

AnnMarie was Jim’s doctoral student at the University of South Florida.
You make my head hurt: My Professor, Mentor and Friend  
--AnnMarie Alberton Gunn

Dear Jim,

We met about 15 years ago, as you were the professor in one of my first doctoral classes. The class was enrolled with a large group of incredibly talented, budding scholars, many of whom had already been in the program for a few years. In full disclosure, I had no earthly clue to what you were talking about for the majority of each lecture. During this time you pushed me to consider the works of Chomsky, Gee, Dyson, Brice Heath, Stanovich, and many more. One day I told you I just could not wrap my mind around the plethora of content, and you told me to (and I quote) “Get over yourself” and start reading everything that was cited. That semester you inspired me, pushed me and made my head hurt. As a doctoral student, I would plead with you that I just couldn’t think of anything to write and you would simply explain to me I hadn’t read enough! Those words of wisdom still resonated with me today.

My head hurt frequently after we spoke. One pivotal moment occurred in my thinking when we discussed the use of empathy from traditional psychotherapeutic discourses, to considered how empathy can translate as a theoretical frame and pedagogical tool in teacher education. The research and scholarly works that emerged from these ongoing conversations continues to impact and influence my practice as a teacher educator and researcher.


Most important I thank you for being a friend. The cards when I had my children, the house warming gift, and the listening ear when I needed to complain or share my joy. Here is a picture of us and colleagues/friends/family upon my graduation.

Dr. King, I salute you on your retirement and wish to offer you a future full of relaxing days on a rocking chair, endless romantic nights with your husband, and a heart full of gratitude from the people who love and have worked with you. I thought of this poem for you on your retirement; it reminds me of our shared passion for equity education and teacher preparation/education. I hope you enjoy your days in Alabama, Tampa, and wherever you may travel.

Daybreak In Alabama by Langston Hughes

When I get to be a composer
I'm gonna write me some music about
    Daybreak in Alabama
And I'm gonna put the purtiest songs in it
Rising out of the ground like a swamp mist
    And falling out of heaven like soft dew.
I'm gonna put some tall tall trees in it
    And the scent of pine needles
And the smell of red clay after rain
    And long red necks
And poppy colored faces
    And big brown arms
EXTRA: Tokens of Thanks for James R. King

And the field daisy eyes
Of black and white black white black people
   And I'm gonna put white hands
And black hands and brown and yellow hands
   And red clay earth hands in it
Touching everybody with kind fingers
   And touching each other natural as dew
   In that dawn of music when I
Get to be a composer
   And write about daybreak
   In Alabama.

You still continue to inspire, push, and make my head hurt. Finally, I look forward to our future work together, because I don’t believe for a “hot” minute you will stop doing the important, good work that you do.

Love your doc student for life,
amg
To Jim King on the Occasion of his Retirement

by

Susan Homan

Susan was Jim’s colleague at the University of South Florida.
To Jim King on the Occasion of his Retirement
April 26, 2019

I cannot even begin to imagine my USF years without you as my colleague and work husband. You truly are a master of pedagogy, knowledge, and personal relationships. I often had the opportunity to observe you with our students/teachers. I marveled at your ability to support their strengths, while helping them continuously strive to be even better. I think our styles meshed because of our differing techniques, as well our mutual respect for teachers and research. And, somewhere along the way, we became friends.

Yes, it’s true, as I often joked, one of the best decisions I ever made was hiring you! You taught me my first lesson when I was driving you around on your interview visit. You no doubt remember that I wanted you to start a Reading Recovery type program at USF. You were not shy about your reluctance to do so. When I asked, “What if I told you we wouldn’t hire you if you won’t work on beginning an early intervention program?”, you countered with, “Is that really the ultimatum you want to give me? Are you prepared for the answer?” Aha! James King Lesson #1 – Be careful what you say, words matter.
One of our most successful joint projects was the Accelerated Literacy Learning (ALL) program. Over a 10 year time span, we trained 26 teacher trainers, who trained hundreds of teachers, who helped thousands of struggling readers reach on grade level reading success. The program was successfully implemented in 11 school districts in Florida. While I was happy to successfully train teachers and observe them with students, you insisted on also working with struggling readers whenever possible. James King Lesson #2 – It’s always about the children.

I had hoped to include copies of our joint publications, but have learned that “isn’t allowed”. (Note to Jim, you know I’d find a way to work around that if I was still at USF!). We had 7 joint national publications, more than 20 technical reports, and over 100 joint presentations at the national, state and district level. We teamed with school districts and received over just under $1,000,000 in grant funds. James King Lesson #3 – Sharing your successes and failures helps others also do the “work” of helping struggling readers.

While we teamed together for the ALL program, we also worked together to provide guidance and support for our doctoral students. You modeled such positive behaviors in this area. Your mentoring of doctoral students taught me how to mold and support each individual in the ways that would best support them as future professionals. You are/were a superb doctoral student mentor and
advisor. I really learned so much from you about how to be that kind of mentor. (I never came up to your level, but at least I had direction and goals to be like you!). Perhaps this lesson was the most important, **Lesson #4 – always listen first, make sure you hear and understand what the other person is saying, respond with thought and heart.**

Jimmy King, you taught me to be a better professional and a better person. You are an amazing professor/teacher/writer/mentor/and human. You will be missed by the profession, the university, the college, and the department. I’m so happy that I still get to be your friend.

Enjoy every day!

Love,

Susan
THE A.L.L. PROGRAM

Components of an A.L.L. Lesson

- Rereading opportunities which aid in the development of fluency and expression
- Assessment of students' reading through use of running records
- Student initiated writing activities which help develop word analysis strategies and increase students' awareness and knowledge of print
- Book experiences which allow the student to acquire and apply new reading strategies
- Student participation in a reading apprenticeship which is accomplished by intensive interaction with a teacher well-versed in scaffolding techniques
- High expectations for the development of independent strategic readers

A.L.L. Program Features

- Preparation of teacher trainers (T.A.L.L.S.)
- Year-long teacher training
- Continuous program evaluation
- On-going program development and refinement
- One-on-one and small group 30 minute lessons
- Alternative small-group models
- Video-taping and observational feedback

Program Goals

- To accelerate the reading progress of A.L.L. students to a level of average or above
- To support and improve students' self-esteem by providing successful reading and writing experiences
- To lower the rate of referrals for special education classes
- To lower the number of potential high school drop-outs by providing successful reading and writing experiences for students

ACCELERATED LITERACY LEARNING

Susan P. Homan, Ph.D.
James R. King, Ed.D.
University of South Florida
Letter to Jim

by

Sherry Moser

Sherry was Jim’s doctoral student at the University of South Florida.
Dear Jim,

It is hard to know how to start a letter to someone whom had such a profound impact on my life. I was a wee bairn in the field of education when I decided to pursue a master's degree. When I walked into the first day of your vocabulary class, my world changed.

I believed that I had a good undergraduate program in elementary education, and I had five years of experience when I began your class. I thought I was fully prepared for this next step, and I had confidence in myself as a teacher. What I was not prepared for was the expectation of accountability in deepening my knowledge of teaching children that you shouldered on us all. This class, the first of two that I took with you, made me ask myself, “What in the world have you been doing to kids for the last five years?” You helped me learn, for the first time, how to be truly reflective about quality of instruction. This focus on quality only improved as I took another class with you. By the time I finished my master’s program I knew that I wanted to pursue a Ph.D. I knew that there was so much more to learn, and I wanted you to help me do just that.

Picture it….Tampa…2003. I took my first course with you in my doctoral program. I will never forget how you clapped your hands together when you saw me, gave me a hug, and said, “Finally!” From that day forward you guided me through the complicated world of being a doctoral candidate. I sat across from you in your office one day, and you told me to get moving on my dissertation; it was not going to write itself. I struggled, sweated, wrote, and rewrote the beginning of Chapter 1 and produced eight whole pages!!! And you took those pages, asked those aggravating questions that you always ask that provoke deeper thought and revision, and put me on the path to become an academic writer. While I thought it would take forever to actually become Dr. Moser, in 2010 you put the hood on my shoulders.

Because of you, my life as an educator changed. I have been an elementary classroom teacher, reading specialist, reading coach, and district literacy curriculum coordinator. I am now a full-time professor at Polk State College in the Bachelor of Science Elementary Education Program. I was hired because of my background in reading, and I am one of only two people hired to begin the program. We are completing our third year, and our first group of six brand new teachers graduated last semester. We have sixteen in internship this semester, and principals are lining up to hire them. I take everything I learned from you about reading, about instruction, about reflection, and about perseverance and use it every day to enhance my instructional practices and, hopefully, those of my students.

Thank you, Jim. It has been such an honor to work with you. I hope your retirement is full of love, laughter, and joy.

With love and respect,

Sherry Moser
Found Poems in James R. King’s Uncommon Caring: Learning from Men who Teach Young Children

by

Csaba Osvath

Csaba was Jim’s doctoral student at the University of South Florida.
Dear Dr. King,

Thank you for giving me a map and marking on it the countless treasures and thrilling quests. You are giving me a lifetime of joyful explorations, discoveries, and all the tools to tell the tales – in the end.

Truly, Csaba
The Author

Profess O Child
Gauge the aches and
Search in a room with
Virginia

Read the current
Search the error
Primary Teaching

Teaching time:
Remember, disconnect, reveal
Signal an emotional connection
Distance make affection to respond to Self
Watch in caring...

Caring as a story
Learn affection, acceptance, and warmth
Create opportunities for teaching as caring

I did
I did
I did
I was risky

Remember the skill of hugging!

1. Interviews are identified with the month and day on which they occurred.
Silence and Desire

Fine, Fine, Fine
Can silencing control lives?
Enter a zone where passions are encouraged
Be passionate about our silence
Passion in silence is never a vacuum
Our passions can locate ourselves
Therefore, feelings are to be dealt with words.
Explore the erotic
Be aware
The silencing of desires distort of those silenced
A healthy desire is an exchange that serves.
Do not quench it!
Teach desire as a child
Teaching as Caring

Make teaching a relationship a caring act.
Be the one caring and the one cared for
Teach it!
Teach relationships!
Enter the profession of caring.
Receive the student well
Engage the student
Be present
Offer all
Be a being-there teacher
Care,
Care,
Caring,
Remain revealing
Care,
Care,
Caring.
Teachers are marked based on caring acts based on providing for others.
Lessons from King: Being an academic and a good human

by

Sarah Pennington

Sarah was Jim’s doctoral student at the University of South Florida.
Lessons From King: Being an Academic and a Good Human

By Sarah Pennington

When academics reflect on the impact of their mentors, many things come to mind. These august individuals introduce us to theory, methodology, philosophy…the list goes on. And Jim King introduced me to these things as well. His lessons have remained a part of my academic DNA. But Jim taught me other, more important, more human things. And it is upon these lessons that my career (and success thus far) as an academic is most truly built.

Jim’s impact on my career began before I ever considered entering the world of academia. I was a new teacher in a rural Florida school district who needed to complete a reading endorsement to continue my employment. Jim King and Susan Homan were the university professors contracted to come and do much of this training for the district. My background was not in education, but I had found my passion and purpose in the classroom. And so, a fresh and (arguably) overly-optimistic teacher was introduced to the world of basic reading skills, literacy pedagogy, and allowing children to find joy in reading. Little did I know how rare that last element would be in much of my in-service training, which would quickly shift into a focus on “bubble kids” and standardized testing. Still, I embraced the lessons shared in those reading endorsement classes and I endeavored to keep joy within my own literacy classroom.

Years later, I began to see higher education as a possibility. I had completed a master’s degree in gifted education and had found a new passion that balanced with my love of the classroom – research. I wanted to understand the why and how behind what was working in my own classroom. Although I still loved working with my students and nurturing their love of reading, I felt that a new level of challenge was calling to me. As I pondered what program
would be a best fit for my aspirations, I remembered the sense of belonging and connection, the learning and joy, and the passion for what is best for children that I felt during those reading endorsement classes. That was at the heart of what I wanted to experience and become on my academic journey. And so, I contacted Jim to see if he thought I would be a good fit for USF’s Ph.D. program in literacy studies.

Much has happened since then. With Jim’s guidance and support, I completed my Ph.D. and found a tenure-track position at a university I love. I have published and presented, revised and resubmitted, networked and taught. And throughout it all, I learned many lessons from Jim. Many of these were academic lessons – theory, methodology, philosophy. But those are not the ones that have molded me into the academic that I am still becoming. Jim’s greatest lessons for me have been more about being a mentor, teacher, and overall good human. It is these lessons that I want to share with my undergraduate and graduate students. Two of these lessons, in particular, have supported me as I continually strive to stay in touch with the human side of academia; to know my students, my research participants, and my colleagues as more than names on paper.

**Lesson 1: Kindness and empathy are not gendered characteristics; they are human characteristics.**

Jim’s work in early elementary and his focus on other men who undertake work with young children shines a light on the often-gendered perceptions of what children need at this age and who is best prepared to provide it (King, 1994; 1998; 2000). These perceptions are still pervasive as I write this in 2019 and take a mental tally of the males in the elementary education courses I am currently teaching. In one class section of 34 students, there are six males. Although there are likely a number of reasons for this low number of males in the elementary education
teacher prep program, the gendered views of primary teaching as “an act of caring” (King, 1998, p. 3) may make many men see the profession as incompatible with their views of themselves as traditionally masculine. Such perceptions of the teaching profession, especially at the primary grades are, at best, close-minded and, at worst, harmful in that they enforce gender norms that should no longer be the norm in our modern society. (Toxic masculinity, anyone?)

**Lesson 2: Mistakes will be made. Reflect, repair (when possible) and move on.**

I have always been a perfectionist. I suffered regularly from imposter syndrome before I knew what it was called. Jim judged with kindness, guided when I was off-track, and never told me that what I wanted to do was impossible, even when it seemed highly improbable. And when things took a slight detour, he helped me talk through what happened, why it happened, and how I could get things moving again. Mistakes were not failures. They were part of the process. This was something I had always told my students, but never internalized for myself. And as I look back at both my own talks with Jim and his writing (King, 1994), his own mistakes were often shared and discussed as opportunities for learning.

Building from Jim’s example, I also share my mistakes with my students - we talk (and sometimes laugh) as I share the things I wish I had done differently. I reflect on what I learned from each experience and encourage them to reflect on their own stumbles. When the mistake is recent, they see me taking steps to fix the consequences of that mistake and hear me own it and learn from it. And they see it for the authentic modeling that it is. And when they make a mistake, they are less likely to bury themselves in self-recriminations and see it as a failure. They reflect on it, they learn from it, and they integrate that new knowledge into their practice. I start each semester reminding my students that the goal of education is not perfection, but learning.
And I mean it, for them and for myself. Although Jim never spoke these exact words to me, the spirit behind them is inspired by his example.

**Lingering Lessons**

There are so many things a student can learn from a good mentor, and I count myself among those fortunate enough to learn from and with Jim. He reminded me of the need to laugh, to take care of myself, and to pursue what matters to me. He has been a coach when I needed direction and motivation, and a cheerleader when I just needed confirmation that I was on the right track. And, in the tradition of the best mentors, Jim is a friend who makes room in his heart for those who come to him to learn. Cheers, my friend!

**References:**


Influential professor, inspiring mentor, beautiful spirit!

by

Christine Picot

Christine was Jim’s doctoral student and Jim’s colleague at the University of South Florida.
Influential Professor, Inspiring Mentor, Beautiful Spirit!
Jim King

You have inspired and lead me to pursuing the path of my passion many years ago. As one of the first doctoral students to enter into the program with a specialization in mathematics, I struggled with finding a research focus. My first course with you, I was early in the program. I remember within in the course syllabus, there was a pretty substantial assignment where we had to present our work to the group. With tears welling up in my eyes, I wondered, “how will I connect mathematics to this literacy assignment?”

The content within the course was beyond my pay grade at the time (laughing) and consisted of information I never knew existed (Big D, small-d discourse). After pulling you aside in class after our session, you provided me with the guidance I needed to make the connections that have carried through my research, publications, teachings, and PD. I began to develop my mathematics discourse vocabulary project for class presentation. After my presentation the rave reviews and compliments you provided gave me the confidence to move forward full speed ahead! I will never forget that moment and will never be able to find the words to “thank you!” This project was a power point book that a teacher and I created based on my vocabulary/literacy project in your course. My entire team of Grades 3-5 teachers used the book in their classroom teachings. It was my first creative work used to help 100’s of students acquire the mathematics content of area and perimeter and guide my research focus moving forward.

During the countless hours of creating this book, you were at the forefront of my mind. Through this project, I was able to develop my dissertation focus. And with the continued gracious guidance of you, Jenifer, and Denisse my research agenda blossomed into global work, PD, articles, and course

innovations. I am forever grateful! ~Christine

Christine Joseph Picot, Ph.D.
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UNIVERSITY OF SOUTH FLORIDA.
Ode to Jim

by

Janet Richards

Janet was Jim’s colleague at the University of South Florida.
Ode To Jim

Dear Jim

You’re leaving us
Now what to do?
When we can’t connect
With our favorite dude?

Where will we turn
To hear latest news
Or get advice
Or hear your views?

What fun we’ve had
And also concerns
That made us want
To overturn (You know who)

So Jim
Enjoy your retirement time
I love you baby
You’re in your prime!!!!!

- Janet Richards
Dear Jim

by

Elizabeth Shaunessy-Dedrick

Elizabeth was Jim’s colleague at the University of South Florida.
April 4, 2019

Dear Jim,

Thanks for your humor, curiosity, criticisms of structural quirks, and candor in challenging authority. Some years here have been more challenging than others, but when those the times were difficult, you were willing to stand up for faculty and students. You have exemplified the very spirit of *collegiality* in living the definition; you represent and express the collective interests, values, and goals of fellow faculty and students—particularly when these are in jeopardy. You have recruited great colleagues, worked well with strong women, taken this College forward methodologically, and dog gonnit’, people still like you!

So here is my run down of the Jim memories I have. We served together on 3 search committees, all of which will likely have an important bearing on the future of the College in the very near future.

- In 2014-15, we served together on the English Ed. Search for an Assistant Professor (#1227), which led to the hiring of Dr. Michael Sherry.
- In 2016-2017, we served together on a search for a Literacy Assistant Professor (#7778), which led to the hiring of Dr. Liz Hadley.
- Most recently, in 2018-19, we served together to find a Literacy Assistant Professor (#4483), which led to the hiring of Dr. Patriann Smith.

Something tells me that if we looked back across the history of the USF College of Education—perhaps at your CVs for the years you have been here, we would find other faculty members for whom you also had a role in recruiting and selecting. We have much to thank you for, given the time, commitment, and care you have taken in all of these efforts— or we have so much to blame on you.

In good collegial spirit, and using the same keen sense of talent spotting that has earned you the reputation you have rightly earned here, I think you know well the respect, admiration, and appreciation your colleagues have for you.

While your strong interpersonal skills and jocularity have been among the most noticeable and often memorable qualities, this college would be remiss in not recognizing the critical scholarly contributions you have made to this place. Co-developing the first course in qualitative research in the history of the college is one of the signature contributions for which you’ll be remembered. Few of the current faculty in this college likely know that you and Dr. Barbara Spector spearheaded the movement into what was then an emergent methodology, paving the way for many others to carry forward a strong tradition that is very much the identity of this college.
Your productive relationships with Literacy faculty is also notable, as you have a history of finding ways to engage with colleagues who are equally eager in engaging, creating, and disseminating research in the interest of students, teachers, and the community. Among your partners in crime—Dr. Susan Homan, with whom you traveled into near and far reaches of this state, enjoying a long and fruitful collaboration that brought external funding, publications, and professional development.

As educational technology presented new opportunities for teaching and learning, you worked diligently and purposefully with your colleagues in Literacy to develop the premier distance-learning MA in Reading, which is the top program in the nation for quality instruction, innovation, and job placement. While this is a shared honor among you, Danielle, and Jenifer, you were likely a central contributor, someone master’s students recognized could relate to the day-to-day instructional life of an educator, and someone who challenged them (them being the students, Danielle, and Jenifer, of course)!

I will also remember a conversation we shared during an NCATE accreditation meeting with examiners a decade or so ago. We discussed the challenges of managing and assessing student discussions online. You wisely redirected the conversation and suggested a book that might address some of the online learning issues I grappled with. I knew then—from that exchange, in that space, of your character, care, and depth of knowledge. These are the very things I am certain your colleagues and students see on a daily basis.

In my work on faculty search committees these last several years, the Literacy faculty best exhibited the level of trust, professionalism, quality standards for student performance, and openness for candid faculty exchanges of ideas. Again, while your colleagues share in this honor of having built this program culture with you, as the senior member of the group, you modeled the level of understanding and respect that is the spirit of the program. You have also molded—and been molded—by those who have come to the program since you started here. And you’ll retire from this College and Department and Program knowing that you—perhaps more than any other faculty member in this place, are leaving it in even better shape than you found it—the sign of the greatest care and investment a faculty member can ever hope to make at their institution.

Jim, I wish I had had more time to learn from you, talk with you, observe you doing your work, and laughing with you. I sincerely appreciate the life you chose to make here in this—of all colleges in the country—USF College of Education. Come on back and share your travel stories, stories of living in Alabama, and give us all a chance to enjoy you again.

With admiration and gratitude,

Elizabeth Shaunessy-Dedrick
Contributor Biographies
Marino C. Alvarez is professor emeritus in the Department of Teaching and Learning of the College of Education at Tennessee State University. He received his Associate in Arts degree from the Junior College of Albany, Albany, New York and his Bachelors of Arts degree from Fort Lewis College in Durango, Colorado. His masters (M.A.) and doctoral (Ed.D.) degrees are from West Virginia University, Morgantown, West Virginia.

Mary Alice Barksdale is program area leader for the Master’s in Elementary Education at Virginia Tech. She met Jim in 1988 and they have had shared interests in literacy education, elementary and primary education and teacher education, global education, and social justice - as well as unending friendship!

Susan V. Bennett is an assistant professor at the University of South Florida St. Petersburg. She is a regional director for the National Association of Multicultural Education. Her research focuses on culturally responsive literacy practices.
Margaret Branscombe graduated with a PhD in Literacy Studies from the University of South Florida in May 2015. Her dissertation explored drama as a tool to represent main ideas in science informational texts. She moved to England with her family and worked for three years as a drama practitioner, working in schools, youth centers and with a team of particle physicists to design workshops that incorporated drama to teach about particle acceleration. She recently began working as a Literacy Intervention Teacher at a secondary school near London. A book based on her doctoral research was published by Routledge in March 2019, titled *Teaching through Embodied Learning: Dramatising Key Concepts from Informational books*. She is very excited about this! Her mission to save the world through drama continues...

Roger Brindley, Ed.D., leads global engagement for the University of South Florida (USF). A USF professor for 23 years, Brindley has received the Outstanding Undergraduate Teaching Award and the USF President's Award for Faculty Excellence, and was identified as an Honored Professor by the National Society of Collegiate Scholars in 2001. Brindley has written numerous articles in North American and European publications on policy and practice in higher education, and served as editor for three national/international journals.

Dr. Danielle Dennis is an Associate Professor of Literacy Studies at the University of South Florida. Her research focuses on literacy curriculum and assessment, teacher education, and policy. She serves as the Co-Director of the Urban Teacher Residency Partnership Program and as Professor-In-Residence at Cottenham Primary School (UK).
Linda Shuford Evans met Jim around 1990 as a newbie PhD student, and Jim became her major professor. Graduating in 1997, Linda worked in the fields of bilingual/ESOL/teacher education in the SLAIT program at USF and the TESOL program at Kennesaw State University, retiring early to live in upstate NY.

Aimee Frier is a visiting instructor in Literacy Studies at the University of South Florida in Tampa, Florida. Aimee teaches courses in foundations of literacy instruction, writing methods, and children’s literature. Her research focuses on literacy instruction for students with reading difficulties, digital literacies, and diversity in children’s literature.

Dr. AnnMarie Alberton Gunn is an Associate Professor, Literacy Studies, College of Education, USFSP. Dr. Gunn is commitment to working with groups of children and families that have been traditionally marginalized by society. Dr. Gunn has numerous publications and conference presentations focusing on culturally responsive literacy practices within teacher education. Her passion is to support teachers and prepare future teachers to teach all children in prek-12th grade classrooms and serve the larger community.
Julia Hagge is an Assistant Professor of Reading Education in the Department of Teaching and Learning at The Ohio State University. She teaches foundational and licensure courses in literacy at the undergraduate and graduate level. Her research is focused on inclusive literacy experiences for diverse learners. She examines the ways potentially marginalized students are afforded increased access to meaning-making via new media literacies. In addition, Dr. Hagge explores ways to promote development of inclusive literacy pedagogies in teacher education. She is interested in pedagogies to promote intellectual quality, connectedness, value and engagement with difference, and supportive classroom environment.

Susan Homan is Emeritus Professor at University of South Florida. Dr. Homan’s research expertise includes emergent literacy, adolescent struggling readers, and diagnosis. Her current research focuses on evaluating interventions for struggling readers. In particular, she received over $700,000 to study Tune Into Reading. She was the first recipient of the Marguerite Cogorno Radencich Award recognizing university faculty who are innovators and leaders in the field of reading education. In 2007, she was selected to receive the Outstanding Alumna Achievement Award from the University of Florida.

Dr. Deborah Kozdras joined the Stavros Center in 2010 as an Instructor and Chief Creative Officer. Prior to her work at the Stavros Center Dr. Kozdras worked for 11 years as an elementary school teacher. From 2005-2010 she completed her Ph.D. in Curriculum and Instruction with a focus in Literacy and the English Language Arts at the University of South Florida. While completing the program, Dr. Kozdras was the recipient of a Carnegie Predoctoral Fellowship from the National Academy of Education. She has presented both research and practical workshops at a variety of national and international conferences and has published a variety of articles, book chapters, and lesson plans.
Margaret Krause is the Coordinator of Elementary Programs at the University of South Florida. She teaches foundational literacy methods coursework, supervises interns in field experiences, and leads curriculum development efforts for the Elementary Program. Dr. Krause’s research is focused on facilitating a transdisciplinary approach to literacy teacher preparation through synergistic connections between disciplines, university faculty, teachers, and students. Additionally, she explores the affordances of multimodal literacy practices for marginalized learners.

Dr. Sherry Moser is a professor at Polk State College in Lakeland, Florida, in the Bachelor of Science Degree Program for Elementary Education. She also works part time at the Gus. A. Stavros Center for Economic Education and Free Enterprise at the University of South Florida as its Integrated Social Studies & Literacy Specialist. Sherry began her career in education as an elementary school teacher, later worked as a reading interventionist, a reading coach, and as an Elementary Literacy Curriculum Specialist for Polk County Public Schools.

Csaba Osvath is a doctoral candidate at the University of South Florida, pursuing literacy studies with a special focus on qualitative methods and arts-based research. His research explores the epistemological and pedagogical roles/functions of artmaking in the context of literacy education. His current project is the creation of a mixed media collage technique and a methodological artistic process for knowledge acquisition and knowledge production in educational settings. Csaba grew up and studied theology and horticulture in Hungary, prior to his graduate studies and service as an artist and educator in the United States.
Sarah E. Pennington is an assistant professor of K-8 Language Arts at Montana State University in Bozeman, MT. Her research focuses on adolescents' motivation to read and the contextual factors that influence it. As a former middle school teacher, she strives to support pre-service teachers in supporting K-8 students' literacy learning and engagement through an expansion of what texts are valued within the classroom setting.

Lindsay Persohn is a Visiting Instructor in the College of Education at the University of South Florida. Dr. Persohn teaches foundational literacy courses to Elementary Education majors. Her research focuses on arts-based qualitative research methodologies, visual literacy through the art of children’s book illustration, and Lewis Carroll’s *Alice’s Adventures in Wonderland* in particular.

Dr. Christine Joseph Picot is Visiting Instructor in Literacy Studies, College of Education, USF Tampa. She is committed to working with pre-service and in-service teachers towards making connections in cross-curricular teaching and learning. Dr. Picot’s disciplinary literacy focus of vocabulary and mathematics problem solving has led to the development of numerous publications, conference presentations, global work, curriculum, and professional development.
Dr. Richards is a Professor of Literacy Studies at USF. Her research focuses on arts-based methodologies, culturally responsive/sustaining teaching, critical literacy, and transdisciplinary inquiry. Dr. Richards has published more than 150 articles in scholarly journals and recently published her 12th book that offers literacy theory and practical applications strategies for students in grades K-8. Dr. Richards is the Senior Editor of Literacy Practice and Research, the 2008 Landsdowne Visiting Scholar, University of Victoria, B. C. Canada, Literacy Scholar, a member of the International Reading Association's Reading and Writing for Critical Thinking Project in Thailand, Romania, Pakistan, Azerbaijan, and Estonia. She received the 2016 “Award for Scholarly Research” from the International Literacy Association SIG, Organization of Teacher Educators of Literacy. Dr. Richards' was also the former president of OTER/OTEL SIG of International Literacy Association.

Jenifer Jasinski Schneider, Ph.D. is a Professor of Literacy Studies in the College of Education at USF. Jenifer’s research focuses on arts-based approaches to literacy education in which aspects of process drama, children’s literature, and digital tools support students' symbolic development and meaning-making strategies while composing. Dr. Schneider is the author of The Inside, Outside, & Upside Downs of Children’s Literature is an open-access, e-textbook that explores critical issues in children’s and young adult literature through extended discourse and integrated digital resources (http://scholarcommons.usf.edu/childrens_lit_textbook/). Jenifer is one of the founding members of the Contemporary Literacies Collaborative, a study group of faculty and graduate students who examine the ways in which digital tools affect literate practices: http://fcit.usf.edu/clc/index.php

Elizabeth Shaunessy-Dedrick is a faculty member in Teaching and Learning, and coordinates the Gifted Education program and the Ed.D. in Program Development in Educational Innovation. She is a former high school English teacher, which she thinks gives her special entré into conversations with colleagues in Literacy and English Education. She thinks she met Jim on the 2nd floor en route to a Faculty Council meeting in 2012. He said nice things to her about her husband, whom she married later that year.
Dr. Patriann Smith is an Assistant Professor of Language, Diversity, and Literacy Studies in the Department of Curriculum and Instruction at Texas Tech University. Dr. Smith’s work addresses the ways in which the cross-cultural and cross-linguistic challenges faced by [immigrant] students, teachers, and educators can be taken into account in literacy teaching, learning, and assessment. Dr. Smith has demonstrated how standardized, non-standardized Englishes, and the language ideologies that inform the use of these Englishes, both challenge and create affordances for cross-cultural and cross-linguistic literacy teaching, learning, and assessment of Black immigrants. Through this research agenda, Dr. Smith creates opportunities in literacy curriculum, assessment, and policy for better addressing the academic needs of (Black immigrant) educators and students.

Norman A. Stahl is Professor Emeritus of Literacy Education at Northern Illinois University. His Ph.D. in Language Communications was awarded by the University of Pittsburgh. He has been the President of the Literacy Research Association, the Association of Literacy Educators and Researchers, the College Reading and Learning Association, and Chair of the American Reading Forum. He is a CLADEA National Fellow and a member of the Reading Hall of Fame. His scholarship focuses on postsecondary reading/learning, literacy history, and research methodology with 125+ publications (books, articles, chapters, reviews, commentaries) and over 250 conference presentations.

Sherridon Sweeney taught 1st, 2nd, and 3rd grade in Tampa, Florida before leaving the classroom in 2016 to pursue her Ph.D. in Literacy Studies, with a research emphasis on literacy teacher education in urban settings. She currently works as the Literacy Content Coach for the USF Urban Teacher Residency Partnership Program (UTRPP).
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Editors’ Note

It was an honor to collaborate with so many people from Jim’s academic career in the making of this festschrift. Along the way, we learned so much more about our beloved Jim. He is an incredible mentor, brilliant academic, and loyal friend.

The title of this volume “EXTRA” stemmed from a conversation at a faculty meeting in the Fall of 2018. As Jim walked back to the lunch table to retrieve extra potato chips (a delicacy he was not allowed to keep in his own home), Lindsay made the comment that Jim, himself, is so very “extra.” As everyone around the table agreed, Jim asked for the second meaning of the word. Urbandictionary.com defines extra as “over the top, excessive, dramatic, way too much.” Naturally, this earned a hearty laugh all around. This special word for this special person with his expertise in Linguistics seemed the perfect fit for a volume dedicated to ideas inspired by Jim and messages of thanks to Jim for his knowledge, support, dedication, and caring. Those laughs around the table roused by Jim’s zest for life will continue, even as Jim rocks on the porch in Alabama, enjoys new sights abroad, and continues to serve as mentor and friend.

Jim, we hope you enjoy your retirement - you deserve it!

With love,
Lindsay and Aimee