

**RHODES UNIVERSITY**

**EDUCATION DEPARTMENT**

**CREATING A RELATIONSHIP: A DISCOURSE ANALYSIS  
FOCUSING ON THE CONSTRUCTION OF IDENTITIES AND  
RELATIONSHIPS IN DISTANCE EDUCATION MATERIALS  
FOR A TEACHER UPGRADE PROGRAMME**

**Thesis submitted in partial fulfilment of the requirements for the degree**

**MASTERS IN EDUCATION**

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## Abstract

Distance education, and therefore the writing of distance materials, is a growing field in South Africa. This makes it potentially a site of innovation and change as writers experiment with ways of creating effective teaching situations at long range. The *Fort Hare Distance Education Project* materials seem to be a response to both the increased need for teacher upgrade programmes and the need for innovation to tailor those programmes to the needs of local teachers in a changing society. This innovative attempt to communicate with tertiary distance students has unusual features which suggest that they are worth investigation.

Using discourse analysis, including the work of Scollon and Scollon on politeness theory, and an analysis of visual elements using categories developed by Kress and van Leeuwen, this study focuses on 18 pages of a sample text, booklet 9, “A Whole Language Approach,” to investigate how the writer-reader relationship and the identity of the reader are constructed.

The analysis reveals a complex, interlocking construction of identity and relationship, producing and resolving apparent contradictions as writers move from one position to another while they negotiate their ongoing and evolving relationship with the readers.

Features of identity and relationship operating through the text include issues of authority, changing roles of teachers and learners, trust, what constitutes appropriate language and materials, acknowledging prior learning in under-qualified professionals, ownership of the text, hierarchy and egalitarianism, and stereotyping.

The study suggests that the Fort Hare Distance Project materials offer an example of strategies suited to local students which should benefit those who design such courses. It further suggests that visual analysis together with discourse analysis provides insights which seem not to be accessible through a study of the verbal text, and that an analysis of visual elements may widen a researcher’s options. It reveals ways in which writers can negotiate conflicting positions and consciously or unconsciously attempt to resolve contradictions and ambivalence. It suggests issues which need to be negotiated in any text written in South Africa for a similar audience.

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“It came to him like a shaft of light. *It’s all conceptual!* The driving force in human society was not greed or the lust for power, as he had always thought, but the energy generated by juggling with concepts, endlessly striving to make perceptions of reality agree with them, to melt things together, iron out problems, harmonize warring elements, what was the phrase he was looking for? *Eliminate the contradictions.* They would rule the world who knew this and used it.”

Odysseus in *The Songs of the Kings*. Barry Unsworth

## Table of contents

Abstract .....	ii
Acknowledgements .....	iii
Table of contents .....	iv
Chapter One: “What is going on here?” .....	1
1.1 Details about the production and use of the text .....	2
1.2 Context of production: Genres which may have influenced the <i>Fort Hare Distance Education Project</i> materials .....	3
1.2.1 Conventions of academic writing .....	3
1.2.2 The genre of distance education in South Africa .....	4
1.3 The contexts for which this text is produced .....	6
1.3.1 Schools and Education in the Eastern Cape .....	7
1.3.2 South Africa as a locus of social and educational change .....	9
1.3.3 Utilitarianism as a global philosophy .....	9
1.4 Theoretical and conceptual underpinning of the study .....	11
1.4.1 Constructivism .....	11
1.4.2 Critical Language Awareness and power relationships .....	11
1.4.3 Identity .....	12
1.5 Methodology .....	14
1.5.1 Critical Discourse Analysis .....	14
1.5.1 The process of Critical Discourse Analysis .....	16
1.5.2 Practical issues .....	17
1.5.3 Ethical issues .....	19
Chapter Two: “Who are you?” .....	20
2.1 Awareness of audience .....	20
2.2 The analysis .....	22
2.2.1 Assumptions about readers .....	22
2.2.2 Naming .....	23
2.2.3 Naming through pronouns .....	25
2.2.4 The use of figurative language, allusive language and idiom .....	27
2.2.5 Warnings and negatives .....	32

2.3 Conclusion .....	34
2.3.4 Intersecting identities .....	35
2.3.5 Real vs constructed identities.....	36
Chapter Three: “Who are WE?” .....	38
3.1 Knowledge and power.....	38
3.2 The analysis.....	39
3.2.1 Naming the writers .....	39
3.2.2 Naming the writers through pronouns .....	41
3.2.3 Being assertive: Imperatives, questions, statements .....	43
3.2.4 Being deferential: Modality, conditionals and giving choices.....	46
3.2.5 Writers as academics.....	51
3.2.6 Narrative Structure .....	53
3.3 Conclusion .....	54
3.3.1 Writers’ identity as academics .....	54
3.3.2 Writers’ identity as friends and mentors .....	55
Chapter Four: Constructing the relationship.....	56
4.1 Introduction .....	56
4.1.1 Writer-reader relationships in distance courses .....	56
4.1.2 Politeness: the concept and its history .....	57
4.1.3 Strategies for establishing and maintaining politeness .....	60
4.2 The analysis.....	61
4.2.1 Involvement strategies .....	61
4.2.2 Independence strategies .....	69
4.3 Conclusion .....	73
Chapter Five: Visual elements .....	76
5.1 Introduction .....	76
5.1.2 Readers’ context and interpreting visual text.....	76
5.1.3 Analysing visual text.....	77
5.2 The analysis.....	78
5.2.1 Layout .....	78
5.2.2 Photographs.....	83
5.2.3 Photographs of contributors to the story .....	83
5.2.4 Photographs of children working in groups.....	89
5.2.5 The woodcut of the story teller .....	98

5.3 Conclusion .....	101
Chapter Six: Conclusion .....	102
6.1 Identities and relationship features of the <i>Whole Language Booklet</i> .....	102
6.2 Issues of identity and relationship operating through the text .....	103
6.2.1 Issues of authority .....	103
6.2.2 Issues of trust .....	104
6.2.3 Issues of the “everyday” and the “scientific” .....	105
6.2.4 Issues of acknowledging prior learning in under-qualified professionals .....	106
6.2.5 Issues of ownership and the economic imperative.....	106
6.2.6 Issues of hierarchy and egalitarianism .....	107
6.2.7 Issues of relevance and stereotyping.....	107
6.3 Limitations of the study .....	107
6.4 Further avenues of research .....	108
6.5 The potential value of this study .....	109
References .....	111
Appendices .....	114



## Chapter One: “What is going on here?”

Part of the interest of this study is that distance education, and therefore the writing of distance materials, is a growing area in South Africa for reasons outlined below. This makes it potentially a site of innovation and change as writers experiment with ways of creating dynamic teaching situations at long range. The *Fort Hare Distance Education Project* is an attempt by a university education department to write coursework books suited to the unique needs of educators in South Africa. On first reading, the *Fort Hare Distance Education Project* materials seem to be an innovative attempt to communicate with tertiary distance students (see Appendices 13 and 18 pp 130 & 137). Atypical features of the materials suggest that they are worth investigation through a detailed textual analysis. This produces a very simple research question which drove all later aspects of the research: *What is going on here?*

On a more penetrating reading it seems that the interesting features of the text surround the writer-reader relationship and the identities of the reader, suggesting a further research question covering those two concepts: *What identities do the writers make available to the readers through the relationship they construct in the text?*

This seemed to separate into three areas for investigation, which now form the three analysis chapters of this study:

*What identities do the writers construct for the readers of the text?*

*What identities do the writers construct for themselves in the text?*

*What relationship between writers and readers is suggested by the text?*

The basic research question (*What is going on here?*) also suggests a research tool: the detailed scrutiny of discourse analysis. As the analysis proceeded it became clear that identity and relationship intersect in a complex and subtle way with perceptions of text, text production, social interaction and notions of reality. The text is a meeting place of the genres and discourses which produce such texts, notions of constructivism, critical awareness and different social contexts. The method, discourse analysis, brings its own complex notions of reality, society and relationships to bear. To set the scene of the analysis therefore, I unpack some of the complexities of the field in this introductory chapter. I believe this has the

advantage that I will not have to make theoretical digressions during the analysis itself. It also means that the study does not follow the traditional structure of a thesis. Material usually dealt with in separate methodology and literature review chapters is addressed in this first chapter. This is partly because the methodology (discourse analysis) and the theoretical background (constructivism and critical language awareness) are intertwined. Because the relative length of the text chosen for discourse analysis resulted in comparatively long analysis chapters, I have kept the introductory chapter as short as possible. In this chapter therefore I begin by describing the *Fort Hare Distance Education Project* materials. Then I discuss genres which may have influenced their production, followed by a description of the educational context for which this text is produced. I explore some of the conceptual underpinning of a study such as this and finally make some comments on the methodology and discuss practical issues affecting the analysis.

### **1.1 Details about the production and use of the text**

The *Fort Hare Distance Education Project* materials are the coursework books of a primary school teacher upgrade programme with a Language, Literacy and Communication strand of two “Imithamo” (Units. The connotations of this word are described on p 30) a year, as well as other units focusing on language. It was recommended to me as a carefully written and reputable course developed for teachers who are English second language learners.

The *Fort Hare Distance Education Project* materials comprise A4 soft cover stapled booklets, “Co-ordinated, illustrated and edited by Alan and Viv Kenyon” (inside cover). The authors are listed as Viv Kenyon and Tillie Tshangela. The text appears to be a desk top published venture by the authors and editor in collaboration, and they acknowledge the “patience, expertise and advice” of “the Config Room of L Harry and Sons (printers)” in East London (*Ibid.*). They thank the teachers who trialed the Key Activity in their classrooms during 1998, “especially Ntembsie Guga, Vuyi Tonono and Hlele Fuku, who gave us invaluable feedback” (*Ibid.*). They also acknowledge the “help and support of Nobantu Dlipi who provided us with very useful material” (*Ibid.*). This all suggests that the booklet was workshopped and amended. A booklet produced like this is more likely than other texts to be revised, allowing writers to fine-tune their relationship with readers and to engage with them more personally.

The texts refer to “face-to-face” sessions where introductory activities take place and assignments are explained. There may be other formal and informal contacts between writers (or their representatives such as tutors) and readers, so the text needs to be seen as only one expression of a relationship that may also be established through oral individual and group exchanges, some taking place in a classroom-like environment, but others more informal and egalitarian. Some features of the written text may be explained by the relationship made possible by personal contact.

The *Fort Hare Distance Education Project* materials are influenced by two contexts, firstly that of production, that is the writers’ background and the genres they work in and secondly reception, that is the context of the readers. Interesting features of The *Fort Hare Distance Education Project* materials come partly from their hybrid nature: produced for a university degree course, they are a blend of textbook and course workbook, showing the conventions of some academic genres but challenging others. These genres are outlined in section 1.2 below. Secondly, their interesting features relate to the contexts they are read in, as they respond to social and educational forces in South Africa and the Eastern Cape. These are outlined in section 1.3.

## **1.2 Context of production: Genres which may have influenced the *Fort Hare Distance Education Project* materials**

These materials are written for tertiary students who will obtain a Bachelor of Education degree on completion of the course, and are thus part of an academic discourse between a university and its students. They are also examples of distance materials, so I discuss features of academic writing and distance course book writing below.

### **1.2.1 Conventions of academic writing**

Academic writing follows well-defined conventions which reflect the purposes and standards of the academic community. Elbow (1998:152-153) suggests that “when people use academic discourse they are using a medium whose conventions tend to imply disinterested impersonality and detachment ... a bias towards messages without senders or receivers.” He identifies four main features of academic writing: it explains overtly and explicitly, conceals writers’ feelings and attitudes, uses formal language, showing “a tendency simply to avoid

the everyday or common or popular in language” (*Ibid.*:157) and avoids directness, producing “locutions of indirectness and detachment” (*Ibid.*:158).

Elbow (1998:159) suggests that in the academic arena these conventions promote language use and interaction which is power-based and exclusive; that they teach students “a set of social and authority relations: to talk to each other as professionals in such a way as to exclude ordinary people.” Elbow (1998:160) also maintains that academic writing conventions teach how to “display” knowledge in the academic arena. Summarising, he maintains that “though we may be modest, open and democratic as persons – the price we pay for a voice of authority is a style that excludes ordinary readers and often makes us sound like an insecure guarded person showing off” (*Ibid.*:161). The writers of the *Fort Hare Distance Education Project* materials seem both to oppose and to align themselves with certain of these conventions.

Recent work by Spellmeyer, Elbow, Fishman and McCarthy, Ivanič, and Spack (cited in Zamel 1998:189) encourages students, who are also potentially academics, to find their own “voice,” by using strategies other than established conventions. This means that although the norms presented by Elbow above remain dominant, academic conventions are changing. Harris in Zamel (1998:189) argues that “academic disciplines are not as coherent and well-defined as some of us think ... these disciplines ought to be viewed as ‘polyglot,’ as a system whereby ‘competing beliefs and practices’ overlap and intersect” I hope to show that the *Fort Hare Distance Education Project* materials reflect this trend.

## **1.2.2 The genre of distance education in South Africa**

Distance education texts have special features of their own which are a response to the unique needs of distance students. In the following section I discuss the contexts of distance education in South Africa, and how the different requirements of distance education affect the writing of the text.

### **1.2.2.1 The growth of distance education in South Africa**

Institutions such as the Open University in the United Kingdom and the University of South Africa (UNISA) in South Africa have provided distance education for decades, but other

higher education institutions and some Non-Governmental Organisations (NGOs) in South Africa are increasingly interested in writing distance courses. The South African Institute of Distance Education (SAIDE) was established in 1992, to improve the quality of distance education. In university education faculties a reason for writing distance materials is the critical need for teacher upgrade programmes on a large scale. The University of Fort Hare has consulted with the SAIDE on the writing of the course work books of this study. The latest figures in Edusource (Bot 1999:2) indicate that thousands of South African teachers are under-qualified: 25% in 1999, or 87 800 nation wide and 15 900 in the Eastern Cape. At that time these numbers were a strain on the capacity of higher education providers, and the situation appears not to have altered significantly (Edusource 2000:6). Distance learning seems the most viable way for institutions to reach full time teachers who do not have the time, leave or funding to attend courses on campus.

There is also likely to be an increase in distance learning in response to the National Qualifications Framework, and the recently published Unit Standards explicitly approve distance programmes. Mercorio (2000:107) explains that “modes of delivery are also not prescribed and providers may choose to use either face-to-face, distance or a combination of both methods”.

Already many university education departments which previously taught only on-campus courses now offer “mixed mode” teacher upgrade programmes: combinations of intensive coursework and distance reading or projects. The focus of these courses is adult in-service training. Bot (2000b:125) notes that while enrolment at distance institutions (UNISA and Technikon SA) has decreased by 21%, there is a 195% rise in the numbers of students studying in distance mode at residential universities. The *Fort Hare Distance Education Project* and its materials is an example of this trend.

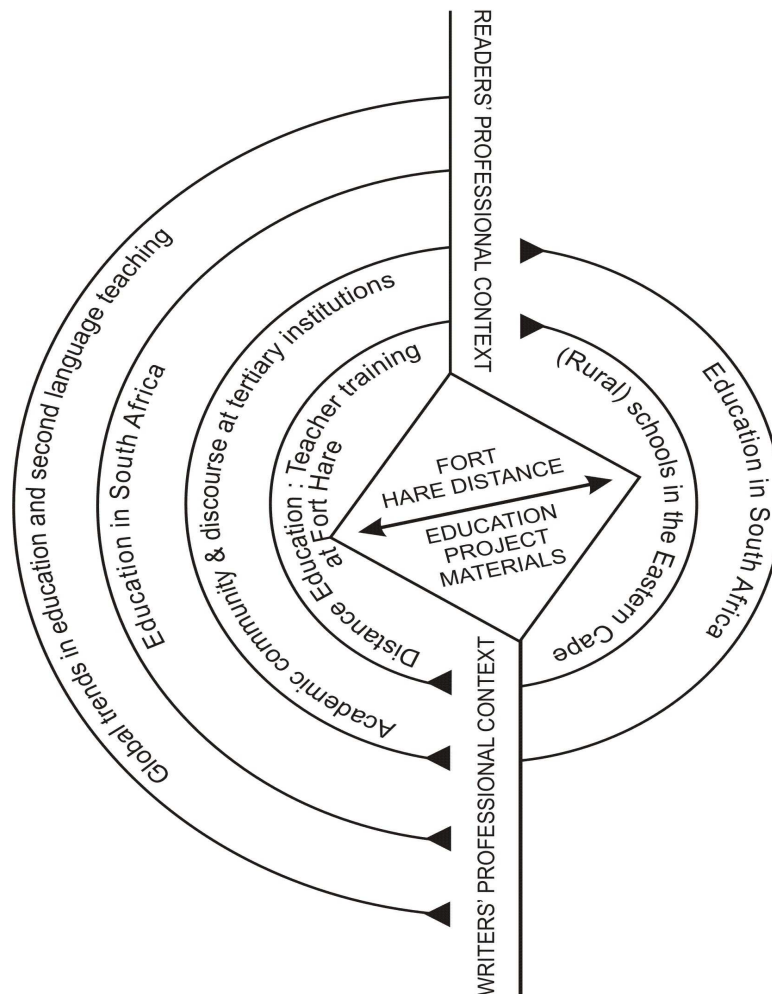
#### **1.2.2.2 Conventions of distance education materials**

Distance course materials need to have the teacher’s orientation deliberately written into them, as the students enrolled in such a course do not have a lecturer present to mediate the text. The language of such materials therefore becomes crucial in promoting a successful educational experience for the reader. Rowntree (1992:125) emphasises that materials should “contain a teacher in a state of suspended animation.” He suggests materials should have

clearly stated objectives, advice on how to study the material, a friendly “you and I” style of writing, material related to learners’ needs, illustrations where they are better than words, “shortish” chunks of learning, many examples, and activities of various lengths and complexity to help learners consolidate, monitor, and reflect (Rowntree 1992:127 - 133). Some of this advice, for example the friendly “you and I” style of writing, goes against the established norms of academic writing, which as I mentioned earlier, tends to be characterised by aloof objectivity. As the *Fort Hare Distance Education Project* materials show some of the features mentioned by Rowntree, they seem to be located more within the genre of distance writing than that of academic discourse.

### **1.3 The contexts for which this text is produced**

Fairclough’s (1989:25) model of language shows concentric rings of contexts which influence the production, use and consumption of texts. These extend outwards to include the writer’s community of practice (in this case tertiary academic institutions), socio-economic forces in the wider society, (in this case in Education in the Eastern Cape as well as South Africa in 2004). Global forces, such as the Utilitarian Discourse System, also influence a text, even one not intended for an international audience. This can be represented diagrammatically as follows:



I have already partly identified the genre of the *Fort Hare Distance Education Project* materials as distance education within the discourse of academic writing. Below I suggest other contexts which may have influenced writers' decisions. As many of these contexts are in the process of gradual or rapid change, a text written by and for individuals at an intersection of these contexts may reflect some of the changing conventions and struggles of all these groups.

### 1.3.1 Schools and Education in the Eastern Cape

The working environment of the readers of the *Fort Hare Distance Education Project* materials is a demoralising one, as I show in what follows, and this may have influenced decisions made by the writers about an appropriate relationship with their readers.

Problems facing schools and education in the Eastern Cape affect every aspect of educational life. Recent typical local newspaper articles report the Public Service Accountability

Monitor's concern that "Education has made headlines for being one of the most problem-riddled departments in the Eastern Cape government, battling with chronic administrative and financial management hitches" (Grocott's Mail 2004:1). A United Democratic Movement representative on national television claimed his party would "rescue" the Eastern Cape from its "mess and chaos" (SABC 3 2004).

The poor administration of the Eastern Cape affects rural schools most severely. Speaking of equipping schools, Bot (2000a:121) reported that "backlogs are severe in schools in rural areas, and the provinces with a high proportion of rural schools have the greatest backlogs (ie: The Northern Province and Eastern Cape, followed by KwaZulu-Natal)." Northmore (2000: 44) gives this picture of the plight of such schools:

Rural schools are found in the small towns and villages, and serve the poorest sectors of the population. They are mostly under-resourced, isolated and lacking the basic amenities. Very little (if any) parental involvement takes place in these schools. Most of the parents are illiterate and many are unemployed. In many cases parents have moved to the urban areas to seek work, leaving their children to be looked after by relatives.

Other demoralising features of teaching in the Eastern Cape include the effects of redeployment, which moved a total of 16 651 educators countrywide (Bot 2000:121). Another pressure on these teachers is implementing new policy. The Chisholm report speaks of teachers feeling "overwhelmed by a 'barrage' of changes, some of which are perceived to be threatening their professional status, job security and deeply-held beliefs" (Chisholm 2000:81).

In addition there are general perceptions about the low status of teachers. For example, science graduates cite "limited bursaries, poor pay, the tarnished image of the profession, a perceived lack of jobs or job security, and poor working conditions in many schools" (Bot 2000a:121). The National Union of Educators (NUE [EC] News 2004:2) calls attention to "an overload of work required of [teachers] ... The overload is leading to an even lower level of morale in the profession and is a contributing factor to attrition in the number of educators." Increases in salary are around 0.5% in real terms (Lewis 2000:5), and "rural teachers generally had no medical aid and housing allowances" (*Ibid.*). The results of this situation can be seen in learners' performance. A study of 12 African countries showed that "South African grade 4 learners have among the worst numeracy, literacy and life skills in

Africa” (Lewis 2000:2). The Eastern Cape senior certificate pass in 2000 was 50%, the lowest in the country (Beard and Shindler 2000:140).

### **1.3.2 South Africa as a locus of social and educational change**

Change can create a stressful environment for those grappling with unfamiliar situations, materials and roles. While some of the conditions mentioned below may not apply to all readers of the *Fort Hare Distance Education Project*, they nevertheless contribute to insecurities many teachers experience. Writers may have taken this into account while addressing them.

The decade since 1994 has resulted in social changes that cannot easily be listed. Dismantling apartheid has meant that change itself is the social context of all those in South Africa. In education changes have been brought about by government policies aimed at reconstruction and development. Outcomes Based Education (OBE) and the redeployment of teachers mentioned above are examples of this. Other significant changes in education are:

- restriction of the age of admission to learners who turn seven in grade 1
- development of the National Qualifications Framework
- introduction of a “Reception” grade
- attempts to involve parents as required by the South African Schools Act
- movement of learners to schools outside their living environment (Sekete 2000:38).
- increased number of independent schools. Since 1994 the number of independent schools has quadrupled (Bot 2000a:126).
- amalgamation and closure of teacher training colleges
- introduction of learnerships, or “apprentice teachers”
- increased access to computers and information technology
- increased multilingualism. “A typical class may contain ten home languages – from siSwati to Hungarian by way of Cantonese” (Dagut 2000:90).

### **1.3.3 Utilitarianism as a global philosophy**

As the Education Department tries to improve education in South Africa it looks at other countries for models, for example OBE from Australia. Writers of the *Fort Hare Distance Education Project* materials are part of an international academic community (they refer for example to a conference they attended in Adelaide). They will both be influenced by and seek to influence their students with educational trends in other countries. Elements of this

global context may have influenced the identities they construct for themselves or their readers.

Scollon & Scollon (1995:104-130) suggest that modern educational philosophies stem from utilitarianism. They believe that this philosophy of good for the greatest number is now the dominant ideology and discourse system of the Western world. They suggest that in education it has produced the discourses of progress, individualism, rationalism, productivity, competitiveness and quantification (for example, marks and IQs).

Scollon and Scollon (1995:115) suggest that one of the defining characteristics of this philosophy in discourse is egalitarianism: the implied reader and writer are assumed to be equals. This means there is

a reinforced emphasis on direct talk, on avoiding elaboration and extravagance, and on promoting close, egalitarian social relationships. The utilitarian discourse system has little tolerance for hierarchical social relationships, and even where they exist, it is assumed they should be set aside in contexts of public communication.

However, there may be two problems with this. Firstly, the discourse of equality may not match the reality of relationships in an institution or community. Many institutions and communities have a hierarchical nature into which the practice of equality does not fit although the rhetoric may be used. In both the schools which are their professional context and the traditional communities which are their social context, readers of the *Fort Hare Distance Education Project* materials may find themselves at intersections of hierarchical vs egalitarian structures which can be expressed through an opposition of utilitarian and anti-utilitarian notions. Secondly, where individuals from hierarchical communities join institutions expressing egalitarian notions, there may be a mismatch of expectations regarding relationships of power, and a lack of understanding of the conventions which express them.

But this philosophy is not deterministic. Above I commented that “change itself is the constant social context of all those in South Africa” and individuals who find themselves at intersections have opportunities for change. They also have choices in the changes they embrace and may construct themselves as teachers, writers, students or readers in opposition to some of the features mentioned above. Teachers moving into this new system will find

themselves at the intersection I suggest, and some strategies used by writers can be understood by reference to utilitarianism.

It seems therefore that the *Fort Hare Distance Education Project* materials are a response to aspects of the readers' context which includes their immediate professional environment, changes in education policy in South Africa and global influences on that policy.

#### **1.4 Theoretical and conceptual underpinning of the study**

The interesting features of the text seem to me to be shaped by the contexts referred to in 1.3 and located at an intersection of identity and relationship, and the way these are constructed by the language of the text. In the account which follows therefore I focus first on constructivism, then on the way in which language can be used to create and maintain relationships as suggested by Critical Language Awareness. Finally I focus on issues of identity.

##### **1.4.1 Constructivism**

Hyland (2001:41) explains that language is “how we construct and sustain reality, and we do this as members of communities, using the language of those communities.” This notion that language constructs reality has further implications. Because language produces, reinforces and maintains contexts, “social institutions use language and it is largely in and through language that meaning is mobilised to defend the status quo” (Janks 1993: iii). In particular, language locates individuals as members of social or professional groups or communities and thus constructs the identity of group members, such as academics. “Writing is at the heart of both professional practice and of learning to become a professional, and the acquisition of specialist literacies is thus central to professional success” (Hyland 2001:43). This in turn affects the relationships of members of those communities.

##### **1.4.2 Critical Language Awareness and power relationships**

There is however a need to be critical of the role of language in creating and maintaining identities and relationships, especially where it reinforces inequalities. Critical Language Awareness (CLA) focuses on how the language of powerful groups creates hegemony in

social relationships: “social norms are a good indication of power relations as many of them reflect the values of the people or groups in society who have power” (Janks 1993: iii). Because of this, CLA is particularly interested in how language could construct and sustain the identities of marginalised or powerless groups. “CLA makes people aware of how language can be patronising, demeaning, disrespectful, offensive, exclusive, or the opposite” (Ivanič 1990:129).

But, “anything that has been constructed can be deconstructed” (Janks 1993: iii). The analytic categories developed by CLA and used in Critical Discourse Analysis, which I explore in 1.5.1, aim to change society by interrogating and revealing mechanisms of power in language. In this way language does not only create relations of power, but also identifies and scrutinises those relations, creating the possibility of changing contexts of inequality. Janks (1993: iii) argues that “if CLA enables people to use their awareness to contest the practices which disempower them, and to use language so as not to disempower others, then it can contribute to the struggle for human emancipation.”

### **1.4.3 Identity**

Language can be used to express and create the identities of individuals and of groups. In the writer-reader exchange, there are two identities being continually negotiated: that of writer and that of reader. Each may choose one of many identities as a position when writing or reading a text. The writer may adopt one of many possible identities as the voice to use in a particular text, and write for example as parent, expert, or concerned colleague. At the same time, the writer may choose to engage with one particular identity of the readers, excluding possible other identities through lexis and other strategies. Engaging with one aspect of a reader’s identity also creates that identity, subtly prompting readers to become the projection of themselves. It is important to assert here that real identity may be less significant than constructed identity: who readers are thought to be may have more impact on individuals than who they really are.

It is important also to assert that identity is not a unitary, fixed manifestation, but is multiple, flexible and changing. Ivanič (1998:15) suggests that this notion is now well established: “Several theorists point out the multiplicity of socially constructed identities. Parker (1989)

questions the notion of a unitary self and commends Harre's (1979) 'notion of a multiplicity of social selves clustered around any single biological individual.'"

#### **1.4.3.1 Identities of the writer**

The identities writers choose through the discursal choices they make, and the ways in which they construct their readers, create a relationship between writer and reader in the text-based exchange. As with all relationships, this will display power differences between the participants. With institutional endorsement on their side, writers can assert power and may employ a variety of strategies to express their authority. Ivanič (1998:32) maintains that "writing is an act of identity in which people align themselves with socio-culturally shaped possibilities for self-hood, playing their part in reproducing or challenging dominant practices and discourses and the values, beliefs and interests which they embody." Therefore, an identity which may most constrain writers is their identity as spokespeople of institutions or communities, in this case as members of an education faculty. Institutional norms exert pressure on writers to use structures and conventions approved by and commonly used in that community. Ivanič (1998:13) speaks of "the powerful influence of dominant ideologies in controlling and constraining people's sense of themselves."

#### **1.4.3.2 Identities of reader**

Ivanič (1998:16) emphasises the important link between identities and educational experience: "I view the experience of entering higher education later in life as one of these critical experiences which foregrounds change in identity." The identities constructed for student readers can subtly affect their success as students and is therefore also an issue of access. Ivanič (1998:33) maintains that "When people enter what is for them a new social context such as higher education, they are likely to find that its discourses and practices support identities which differ from those they bring with them." If these different identities are in conflict with those notions of self-hood already in place they may cause individuals to reject other aspects of the learning experience offered to them. Ivanič (1998:7) tells of students who reject the roles offered to them in tertiary institutions because they feel false and unlike themselves, since the constructed identities oppose important facets of the readers' real identities. Hockey (in Ivanič 1998:7) speaks of "the great difficulty mature students have in establishing a confident and positive self-image. For, despite having gained a university

place, their academic identities often remain contested, threatened and insecure ... Confidence and a new educational identity are hard won in the face of considerable difficulties.” The innovations apparent in the *Fort Hare Distance Education Project* materials may be a response to this challenge as writers attempt to avoid disjunction between text and reader.

Nevertheless there is always the possibility of change. Writers may ignore the constraints of discourse and readers may assert another voice. Ivanič (1998:13) suggests that “identity is not socially determined but socially constructed. This means that the possibilities for the self are not fixed, but open to contestation and change.” It must be recognised however that student readers sometimes have fewer options because of the unequal power relationship and their need to become accepted members of the community if they are to be academically successful. If readers are not able to negotiate other identities or voices successfully, the consequences for them may be severe. In the *Fort Hare Distance Education Project* materials this means that whether the writers choose to conform to or challenge institutional conventions, and whether they signal to readers that they may adopt other voices, adds another dimension to the complex relationship created and maintained by the text.

To summarise, the language writers use constructs identities for themselves and for their readers. These identities propose a certain kind of relationship between writers and readers, creating and sustaining power differences between them, which can impact on student readers’ success as students. Both writers and readers may challenge norms of writer-lecturer reader-student relations through language, and negotiate a unique relationship in a particular text. This seems to be the case with the *Fort Hare Distance Education Project* materials.

## **1.5 Methodology**

### **1.5.1 Critical Discourse Analysis**

Critical Discourse Analysis (CDA) is the analytical tool of Critical Language Awareness referred to on p11 above. Both are located in a critical paradigm which suggests that as language constructs realities it can also be used to challenge those realities. In this it intersects with perceptions of constructivism. CDA seeks to penetrate the surface meaning of language to find a deeper ideologically driven significance (Janse van Rensburg 2001). The

early use of CDA focused on revealing the power relationship between writer and reader, and the way in which language created and entrenched inequalities in society. It suggested that there was no such thing as an “innocent” exchange: all texts are able to suggest and affirm dominant or subordinate relationships for the participants, to construct inequality in the deep meanings of the text. This view of texts and the purpose of analysis is combative rather than exploratory. Located in sites of social change such as gender issues or racial oppression, it sought to expose the “autocrat in the wordpile.” Celce-Murcia and Olshtain (2000:10) suggest:

The primary interest of **critical discourse analysis** is to deconstruct and expose social inequality as expressed, constituted, and legitimized through language use... The research of critical discourse analysts often takes on a problem-posing/problem-solving quality and addresses discriminatory use of language directed at women, lower socio-economic classes, members of ethnic, racial, religious and linguistic minorities, and others.

While CDA is still used to explore social inequality, this combative use of the analytic method developed into a realisation that CDA could explore other issues in texts, always related to power, but focusing on the way in which language creates and maintains identities, access and a diversity of writer-reader relationships. Janks (2001:241) argues for “a view of literacy that includes the issues of access and diversity as well as text production and design that create new possibilities”.

I would like to suggest that a researcher need not seek for the “true” reading where there are apparent contradictions in a text. These contradictions are a linguistic expression of the writer holding in tension the many subtle dominant-subordinate elements of an ongoing and possibly changing relationship. As such they present an opening for the researcher to explore negotiation, conflict and change in the construction of reader identities, and the social forces that produce them. Used in this way CDA alerts participants to the process of change and the position they are taking. It is within this broader understanding of CDA that I have explored the text in question.

CDA is not unproblematic in its application however. Carefully and methodically used, it can provide rich insights into the ideologies of texts, but Fairclough and Wodak in Hyland (2001:46) warn that the agenda of the researcher who “intervenes on the side of the dominated and oppressed groups against dominating groups” can affect the analytical

process. Hyland (2001:47) claims that “unfortunately much CDA has privileged the meanings of the researcher rather than the participants by failing to go beyond the analyst’s interpretations of texts or his or her ‘reflexive’ understandings of its contexts.” He suggests that the solution is to ground textual analysis in an understanding of the participants’ contexts: “The plausibility of any interpretation of a text ultimately depends on our willingness to accept it, and this is greatly enhanced by seeking to establish the intentions and interpretations of participants” (*Ibid.*). Perhaps for this reason Janks (1997:331) suggests the importance of **engagement** with and **estrangement** from a text. In this dual response, the researcher must acknowledge a tension within themselves between accepting some aspects of the text and rejecting others. In my own case I was immediately aware that the writers of the *Fort Hare Distance Education Project* materials had attempted something exciting and new. At the same time I found the “tone” of the writing unpleasingly authoritarian. Janks (1997: 331) observes that

Engagement without estrangement is a form of submission to the power of the text regardless of the reader’s own positions. Estrangement without engagement is a refusal to leave the confines of one’s own subjectivity, a refusal to allow otherness to enter. Without the entry of the other, can we be said to have read the text at all?

As I pursued the study I also became aware of ambivalence expressed through the text. In seeking to explain this duality and the apparently conflicting positions, I have suggested alternative interpretations where they suggested themselves to me.

### **1.5.1 The process of Critical Discourse Analysis**

I applied the analytical categories suggested by Fairclough’s (1989:25) model of Discourse Analysis to the Whole Language Approach booklet. As well as looking at the three main foci of the research:

- What identities do the writers construct for the readers of the text?
- What identities do the writers create for themselves in the text?
- What relationship between writers and readers is suggested by the text?

Such an investigation interrogates the text with questions such as: Who has the right to speak? To question? Who drives learning? Who decides what and how? And why?

Although earlier I suggested the limitations of allowing the text to speak for itself, I have chosen not to ask the writers how they perceive their readers or their construction of them. Nor have I asked the readers for their response. It seems to me that writers are not always aware of all the effects their words may have, and that readers may not be fully aware of why they respond as they do. To make good the limitations of this approach I have suggested alternative interpretations where they have occurred to me, seeking to justify claims from my own experience of the context in order to deal justly with the text and its writers. Fortunately the context is a familiar one, as I have visited under-resourced schools of the Eastern Cape in my capacity as moderator of English Second Language Grade 12 orals.

Validity is also created by the detail and rigour of the study. I have looked especially for recurrent features of identities and relationships which repeat and confirm each other. Patterns which appear at many levels and in a number of categories, suggest that interpretations are valid.

## **1.5.2 Practical issues**

### **1.5.2.1 Choosing a section of the text**

As the *Fort Hare Distance Education Project* materials are an extensive set of texts, I chose to focus on the Language, Literacy and Communication Core Learning Area. After studying booklets 1, 9, 17, 18, 20 and 25, it appeared that a section of text would have to contain the following to be sufficiently representative:

- Un-glossed Xhosa words, phrases or stories,
- Instructions for a report / research activity,
- Instructions guiding readers through an activity with their own students,
- Intertextual reference to at least one other Umthamo (Unit),
- Photographs of learners or teachers,
- An explanation of a learning theory or philosophy,
- Icons and text boxes,
- References to previous lessons and trialing.

Book 9, the Whole Language Approach booklet, has all these features but again I needed to reduce the 48-page booklet to a text small enough for detailed analysis. Therefore I excluded repetitions of materials or activities, as sections with similar purposes seem unlikely to

construct different relationships and identities. I also excluded the conclusion (mainly a passage for students to read) and the appendix (instructions on preparing teaching aids), which left 18 pages of text and photographs. While acknowledging that any exclusion may limit the validity of the study, this remains a long text for a discourse analysis in a half thesis. However the text is written so much as a whole, yet varies so significantly from section to section, that it is difficult to find a smaller representative extract. In addition, many of the patterns that are broken are as interesting as the patterns that are established. For this making and breaking of rules to emerge I found it useful to look at a large section of the text, and to list findings in an appendix rather than put all examples into the body of the thesis. I must emphasise that it is not my purpose to provide a comprehensive evaluation of the whole course, but to probe relationships and identities constructed by writers in the specialist area of distance education.

### **1.5.2.2 The structure of this thesis**

Because of the length of the text I group the reporting of the analysis into four thematically related sections, dealing respectively with the reader, the writer, their relationship and visual aspects. Therefore they are:

**Chapter 2: The reader.** This section focuses on the assumptions writers make about the readers and the readers' probable life experiences, naming of the readers, and the implications of figurative language and negatives.

**Chapter 3: The writer.** This section focuses on the identities the writers construct for themselves. It looks at naming of the writers, pronouns, intertextuality and referencing, stating rules, modals and conditionals, imperatives and questions.

**Chapter 4: The relationship.** This section draws particularly on the work of Scollon and Scollon (1995), and focuses on the relationship created by politeness strategies.

**Chapter 5: Visual aspects.** This section focuses on the visual aspects of the text: layout, photographs and illustrations, drawing on the work of Kress and van Leeuwen (1996).

**Chapter 6: Conclusion.** In this section I summarise the main features of the construction of identities and relationships in the Whole Language Approach booklet, suggest limitations of the study and suggest further avenues of research. As a result of this structure there is no separate methodology chapter because I deal with related methodological issues within each chapter.

### **1.5.2.3 Examining the text: some practical comments on terminology**

The text under analysis is an 18-page extract from Book 9 of the *Fort Hare Distance Education Project*. It is the Core Learning Areas Course in Language, Literacy and Communication, Umthamo 2: *A Whole Language Approach*. My text comes from the Pilot Edition printed in January 1999. I shall refer to this text as the ***Whole Language Booklet***. When I quote from this text I include the page reference as follows: (p00). Unless otherwise stated, italics and bolding is the emphasis of the writers.

For the sake of simplicity I have chosen to call the students of this course the **readers**. The *Whole Language Booklet* sometimes refers to them as **teacher-learners**, and they are also **distance students** and **viewers** of the visual elements. I have chosen the simplest generic form but nevertheless recognise their other roles and relationships to the text and writers. Similarly, although the writers are also **lecturers**, **course designers**, **authors** and **photographers**, I refer to them as **writers** and use this term also in Chapter 5 where I examine visual elements of the design.

### **1.5.3 Ethical issues**

I have been in contact with the editor of the course, Viv Kenyon, who is enthusiastic about the study. I intend to make my research available to her and to the writers. The study may be useful to them as they continue to develop materials. I believe it may also establish principles for other such distance courses in South Africa and contribute to decisions made by the writers of similar in-service training courses at tertiary institutions. The writers are happy that I should refer to the texts and to themselves by name and this will make it easier for the study to contribute openly to a community of teaching and learning practitioners in South Africa.

## Chapter Two: “Who are you?”

In this chapter I focus on the way in which the writers of the *Whole Language Booklet* construct the readers through assumptions about the readers and their probable life experiences, through ways in which the readers are named and referred to, and the implications of metaphor and negatives. I begin by suggesting how an awareness of audience can construct identities, and then proceed with the analysis.

### 2.1 Awareness of audience

All writers will give thought to their readership or audience, as the success of the communication depends on it. Cook (1989:68) suggests that “existing knowledge in the receiver of the message, and the correct assessment of the extent of that knowledge by the sender, are essential for successful communication.” In spoken communication, perceptions about the audience are adjusted as an interaction proceeds. In written communication the notion of audience may be both less accurate and less open to adjustment. Writers may also need to keep several groups or a general very large group in mind as they proceed. An awareness of audience affects every aspect of communication. Cook (1989:90) comments:

Apart from needing to know varying amounts about the office, status, role and personal details of people we are communicating with, we also need to form hypotheses about the degree of knowledge we share with them and the degree to which the schemata they are operating correspond with our own. As we have seen, this assessment affects every level of discourse, from the quantity and ordering of information, to cohesion, the use of the article and grammatical structure.

Commenting on designing distance learning materials (like the *Whole Language Booklet*) Rowntree (1992:38) suggests that writers need to know “anything you might use to help them enjoy the most productive and satisfying learning experiences. Even if you are developing programmes for learners you will never meet, there is much you need to know about them.”

By mentally identifying a real or hypothetical audience, however, writers also provide reading positions for them. Kress (1989:18) suggests that “the function of the writer is to construct texts which confer or alter the manner in which particular texts are read.” On every level a text creates a picture of an “ideal reader,” a cluster of identities which writers wish

real readers to adopt. Readers usually facilitate the communication process by taking up this projection. If they do not adopt the identities constructed for them, they may be alienated from the text and the knowledge it transmits. Kress (1989:36-37) maintains that

The text attempts to coerce the reader, by its 'obviousness' and 'naturalness', to become the ideal reader, to step into the reading position constructed for the reader in the text ... In the longer term these constantly reiterated demands construct certain 'subject positions', that is, sets of statements which describe and prescribe a range of actions, modes of thinking and being, for an individual, compatible with the demands of a discourse.

If readers do not accept the reading position suggested by the text they may be alienated from it. If the readers are students of a course such as the *Fort Hare Distance Education Project*, alienation may contribute to their ultimate failure. The problem may be more acute for first language speakers of Xhosa, reading in English. Angelil-Carter (1995:7) suggests:

In post-apartheid South Africa, where an increasing proportion of our students come from poor educational backgrounds, and whose primary discourses may be very different from that of the school, and these discourses may be very different from that of the university, failure to make the transition successfully is a real possibility.

They may have, as Cook (1989:41) expresses it, "the disturbing sensation of understanding every word and the literal meaning, but somehow missing the point." The writers of the *Fort Hare Distance Education Project* appear to be aware of this and to adjust their writing to as accurate and sympathetic a projection of readers' identities as possible.

By constructing a "reading position," (a set of attitudes to the materials, and their presentation, logic and ideas) the writers construct identities for the readers as people who adopt or reject those attitudes. Kress (1989:39) suggests that "the construction of a reading position has at least two effects. On the one hand, it positions readers precisely in a text, instructing them what role to assume in reading, what stance to take."

I begin the process of investigating the identities constructed for the readers by the writers of the *Whole Language Booklet* by looking first at direct statements about the supposed interests of the readers. I then look at the way in which readers are named and examine assumptions contained in the pronouns. I then analyse the use of metaphors and figurative language and finally I look at the use of negatives.

## 2.2 The analysis

### 2.2.1 Assumptions about readers

The direct assumptions made in the text seem mostly the result of writers' attempts to connect with the lives of these teachers and to draw parallels with situations they hope will be familiar to them; to create relevance. Cook (1989:68) calls knowledge structures which help us understand text "schemata" which he defines as "expectation driven understanding." Schemata usefully explain the notion of relevance, as relevant information activates schemata and makes the text more accessible. The ways in which writers try to make their text accessible, including relevance, show what their assumptions about the readers are. The assumptions made about the readers of the *Whole Language Booklet* are that they are Xhosa-speaking women.

#### 2.2.1.1 Readers are Xhosa speakers

A basic assumption about these readers is that they are Xhosa speaking. The course uses a number of Xhosa words for sections and structures, all unglossed but explained at the beginning of Umthamo One, such as **umthamo**, **iintsomi**, **umKwezeli**. A whole intsomi (traditional tale), included on pages 19 and 20, is given first in Xhosa (p19-20) and then in English. Some phrases in the story are unglossed, and others glossed almost incidentally (see 1 p114). For example:

Eventually she remembered parts of a story behind one particular idiom, 'Ayikho impungutye kunene. Zonke iimpungutye ziya lingana.' (p16).

The river was actually called 'umlambo otshayela amaxoki,' the river which drowns all liars (p17, 26).

This locates the readers firmly in the Eastern Cape / Border area. If they are not Xhosa or Zulu speakers they will miss the significance of the terms. This assumption is reinforced by the writers' use of Eastern Cape place names such as Adelaide (p10) and King Williams Town (p18).

Although the writers use Xhosa, they do not seem to use any African English forms. The only exception may be when they speak of approaching "an elderly somebody" (p22) for a

story. This structure may be embedded in a convention of showing respect by referring obliquely to “a person.” If so, it is the only example of African English in the text.

### 2.2.1.2 Readers are women

Another assumption is that the readers are women. As the course is designed for rural primary school teachers this is not unreasonable as national statistics show that “the teaching staff is predominantly African (71%) and female (63%). At the primary level, women comprise 73% of the teaching force” (Bot 2000b:2). The writers use their readers’ gender when they make this analogy:

Now think of yourself. You probably have lots of different jobs or roles to play. Maybe you are a mother, a wife, and a housekeeper, as well as a teacher. Maybe you also have certain other jobs that you do in your community. You aren’t four or five different people. And often the other ‘unofficial’ jobs that you do, help you to do your job as a teacher even better. We sometimes have regular times to do certain things. But we don’t have a rigid timetable for the jobs that we do in daily life (p12).

This passage expands the writers’ assumptions: their readers are middle aged family women with many calls on their time from their homes and their communities.

### 2.2.2 Naming

Naming of any kind is an important clue to how the writer is constructing the identities of the readers, explicitly identifying the readers.

On page 26 of the text, the readers are referred to as **teachers**. Hyland (2000:1) suggests that “successful academic writing depends on the individual writer’s projection of a shared professional context. That is, in pursuing their personal and professional goals, writers seek to embed their writing in particular social worlds which they reflect and conjure up through particular approved discourses.” In the rest of the text the writers do exactly that, revealing assumptions about the readers in their role as teachers. They assume that:

- **They are concerned care-givers.** “If we want our children to grow up into truly *whole* human beings, we should think about whether this fragmented (broken up) curriculum is a good way to help them to be *whole*” (p12).

- **They are teaching at poor schools with large classes.** “You will also have to decide whether you write this story-beginning on the chalkboard, or whether you make copies so that your learners can share one copy between two learners. If you have a very big class, this could be quite expensive, especially if your school does not have copying facilities” (p27).
- **They have poor classroom technique:** “Try to get a question from **each** group. Don’t just ask the children who you can rely on to give you answers. Ask some of your more shy learners. Encourage everyone to participate” (p28).
- **They are degree- not change-oriented:** “We have found out in our work with teachers, that if they are asked to try out a particular task or activity with their learners, quite often they do it just that one time. When we were trialling (sic) the Key Activity in the first Mathematics umthamo, we explained to the Principal of a farm school what we were doing with the learners. “Oh yes,” she said. “I did something like that once with my grade 1s for an assignment for my FDE. But I haven’t done it since.” But that’s a problem. If we want to see a change in education, new ideas need a chance to become part and parcel of the regular work in classrooms” (p32).
- **They need practice and repetition to prevent back-sliding:** “If you carry out this activity more than once, we believe that you will notice some differences in the experiences. The second time you do this, we are sure that both you and your learners will improve on what you did before, and how you did it” (p32).
- **They want to give their learners pleasurable learning experiences:** “Any primary school teacher knows that children take great delight in repeating an experience that they have enjoyed” (p32).
- **They may not be aware of developmental opportunities in their classrooms:** “As a teacher you can choose to build on these things. To focus on, and to build on the strengths of learners is a good way of working” (p36).

In addition, readers are referred to as **people**. This group is vague and general. It suggests that their fallibility is a natural human characteristic which they share with the rest of humankind. It dissolves the blame and absolves the readers at the same time:

Many people assume that the word ‘literature’ refers to stories, poems and plays that have been written down (p2). People don’t feed their families meals as separate items (p13).

...and to appraise how well people were using their language abilities (p16).

Readers are also called **teacher-learners**, a name which may have been coined for this course. It suggests that the writers are honouring the experience and skills readers already

have as teachers as well as acknowledging that for the purpose of this course they are also students, but elevated above the status of their own pupils. For example:

This was a chance for your umKwezeli to do some continuous assessment of how the teacher-learners were working...” (p16) and “You will be expected to share this experience with your fellow teacher-learners (p29).

Finally they are referred to once as members of a **class** and **group**, suggesting the double identities of teacher and student. For example:

After a few minutes, as a whole ‘class,’ share the questions from each group, and together think of some probable answers to those questions (p15).

Creating identity through this kind of naming is infrequent however. The writers seem to prefer the less specific and more personal use of the second person pronoun, discussed below.

### **2.2.3 Naming through pronouns**

In addition to direct naming practices, the readers are referred to by pronouns. Pennycook (in Reed 2001: 57) observes that pronouns are “very complex and political words, always raising difficult issues about who is being represented.” In particular there is the problem of **we**, which is “always simultaneously inclusive and exclusive, a pronoun of solidarity and of rejection, of inclusion and exclusion” (*Ibid.*).

#### **2.2.3.1 You**

The most common way that the writers address readers is through the direct second person pronoun **you**, which is used 207 times in 18 pages. By doing this, the writers recreate the direct oral forms of address used in face-to-face and other classroom types of interaction. They insert the readers into the text as the subjects of the instructions, receivers of knowledge, those who must answer questions. **You** reminds readers of their obligations and position: they must respond to the demands of teachers. They may be called “teacher-learners,” but their duties are clear. In most cases **you** is combined with questions which the readers must follow, or with imperatives, which accentuate this, for example:

At the face-to-face session **where this Umthamo is monitored**, you will have to report on your experiences carrying out Part 1 of the **Key Activity**. So you

will need to make sure that you have completed Activity 7 *before* that face-to-face session (p3)

Linked to imperatives and questions **you** creates a direct, compelling interaction between writers and readers. This is not usual in academic writing, which, as mentioned on p3 uses neutral terms and prefers to produce “messages without senders or receivers” (Elbow 1998:152). In the *Whole Language Booklet*, **you** seems to address the reader as an individual rather than as part of a vague group, giving each learner direct responsibility for carrying out tasks. It suggests that the writers of the *Whole Language Booklet* endorse the principles of utilitarianism, constructing the readers as individuals with unique needs and suggesting a direct relationship with them.

### **2.2.3.2 We and us**

The inclusive pronoun **we** suggests that the writer and the reader belong to the same group (Appendix 2 p115). There are 15 uses of **we** and **us** in the *Whole Language Booklet*, but not all them suggest identities with the same clarity. For example “In this umthamo we are concerned with *oral literature*” (p2) could mean “**we**, the teachers and students of the course” or “**we**, the teachers of the course.” Although 15 of such uses may seem a significant number of occurrences, it needs to be contrasted to the 35 times in which **we** excludes the readers, meaning only “**we**, the writers.” (This use is explored in Chapter 3 p41). When **we** is used to exclude, the exclusion is often emphasised by the additional use of **you**, accentuating the division between writer and reader. For example: “In this unit **we** are going to start by giving **you** something to do” (p14, my emphasis). Nevertheless on 15 occasions **we** suggests that writers and readers share group membership and creates the following six kinds of identities for them:

**Participants in the Fort Hare course, both teachers and students.** This identity suggests co-operative learning and sharing. For example “In this umthamo, we are going to look at a way of teaching language which fits in with Outcomes Based Education” (p1).

**South Africans, perhaps South African teachers, possibly Eastern Cape educators** (11 uses). This identity suggests teachers and learners of the *Fort Hare Distance Education*

*Project* who subscribe to the ideals expressed in the course for improving education in South Africa. For example “It is high time that we caught up with other parts of the world ...” (p1).

**Concerned educators.** Perhaps also concerned parents, responsible family and community members (2 uses). For example “If we want our children to grow up into truly *whole* human beings, we should think about whether this fragmented (broken up) curriculum is a good way...” (p12).

**Teachers.** This identity has been discussed above, and suggests the writers as collaborators with the readers in a common educational effort. It implies that the writers understand the problems faced by their readers in their professional lives. For example “Perhaps we need to think of the school curriculum in the same way” (p12).

**Working professionals.** People in general or perhaps those teachers who are also wives and mothers (3 uses). Readers are referred to in these roles at the top of page 12 and the three occurrences of this usage happen immediately afterwards. For example “We sometimes have regular times to do certain things. But we don’t have a rigid timetable for the jobs that we do in daily life” (p12).

**People in general.** Perhaps story tellers or older community members accustomed to the role of story-teller. This identity suggests also the village, wider community, South Africans, humankind (2 uses). For example “When we tell a story orally, the people listening influence the way the story is told (p22).

By suggesting they all share membership of the same group, **we** hints at an equal status for writers and readers, the egalitarianism of utilitarian thinking discussed on p 9 & 10.

#### **2.2.4 The use of figurative language, allusive language and idiom**

Angelil-Carter and Murray (1996:23) observe that “metaphor is so often naturalised, that it is extremely difficult for the speaker of a language to detect it.” Metaphor, allusive language and idiomatic usage have a cumulative effect, building images whose invisibility makes them all the more irresistible. In the section which follows I look first at the similes and

comparisons used in the *Whole Language Booklet* and then at course markers and other idioms.

#### **2.2.4.1 Simile and comparison**

The writers of the *Whole Language Booklet* have used comparison and analogy sparingly: four times in 18 pages. They may be aware of the problems idiomatic language can cause for second language speakers because of its non-literal meaning, and be trying to make their writing as plain as possible. This makes each metaphor all the more significant and highlights the importance of material associated with it.

**Feeding.** On page 12 and 13, the writers quote Hugh Hawes' question "Does it *nourish* the child's growing mind?" (See Appendix 3 p116 for whole quote). They unpack the implications of this metaphor for the readers and drive their point home by comparing the un-integrated curriculum to an uncooked meal:

If you think carefully about what he was saying, it means that to serve nourishing food, you have to put together interesting meals, made up of a number of different ingredients. Perhaps we need to think of the school curriculum in the same way. ... People don't feed their families meals as separate items, such as, first eat some dry porridge, then have a small bowl of amasi, then swallow a pinch of salt. Now take a slice of bread, followed by a spoon of butter, then a spoon of jam. Then finish off with a cup of hot boiled water, followed by a spoon of coffee grains, and finally, two heaped spoons of sugar. (No need to stir!) (p13)

The length of the explanation suggests that the concept is significant and that the writers would like to emphasise it. They seem to have chosen this analogy in the hope that relevance will help make it more concrete; they seem to be trying to awaken schemata. The jocular note ("No need to stir!") is the only attempt at humour in the *Whole Language Booklet* and underlines the importance of integrated teaching still further. Added to the notion of a balanced "diet" of nourishing knowledge in the curriculum is the idea that to be digestible, the knowledge must also be presented in a holistic way – "mixed." The identity this creates for the readers is that of nourisher, cook and care-giver, an unglamorous but vital female role.

**The chain and the river.** On p22 a double metaphor appears. Speaking of the loss of traditional tales through the death of the story tellers, the writers say:

A *terrible* thought is that when these old people are no longer with us, a link of the chain that holds oral storytelling together, will be broken. Many parts of the story will be washed down to the sea by the strong river of time (p22).

Here they openly communicate their emotion: “A *terrible* thought is that...” and encourage readers to share it. But the intensity of their feeling seems to have produced an image out of control. The breaking chain suggests discontinuity and rupture of tradition, while the second part of the image (stories washed to the sea) seems to evoke rural concerns around soil erosion in which the story, nourishment to future generations, is eroded by time and forever lost. In which case, what is the sea? Annihilation and loss? Eternity, if the river is Time? The metaphor also combines an image from Western industrial technology and one from rural farming rather strangely. This double image gives readers the identity of people located in a modern rural environment, but little more. Yet it seems an image most true to the writers’ own voice and is the most spontaneous metaphor in the *Whole Language Booklet*.

**Choir leader.** A third metaphor appears on page 28: “At this point you are going to ‘conduct’ a class discussion – rather like a choir master or a choir mistress!” This image would be extremely familiar to the readers, as choir singing, both sacred and secular, is a well established tradition in Xhosa schools and communities. The identity it gives the reader is that of group leader in a familiar social setting.

**Part and parcel.** The last metaphor is contained in an idiom used on page 32: “If we want to see a change in education, new ideas need a chance *to become part and parcel* of the regular work in classrooms.” This idiom seems accessible to readers through the idea of being included, wrapped up with, although the Collins English Dictionary (1994:1136) defines it more elliptically as “an essential ingredient.” It is part of a section exhorting learner teachers to see their study as more than a degree paper-chase. The section is in italics and surrounded by a double border to draw attention to it. The identity it suggests for the reader is of one who wraps or packs, perhaps presents education. It is an image of inclusivity but an **attitude** must be embraced, and the responsibility is the reader’s. This phrase seems to have been adopted into the idiom of African English and may have been chosen for this reason.

The dearth of metaphor suggests that the writers may have edited out allusive language, and a closer look suggests that the metaphors that remain may result from writers’ emotional

involvement. For example, the first metaphor compares separating subjects in the curriculum to feeding a child unblended and uncooked ingredients. The illogic of feeding a child like this appeals charmingly to the sense of the ridiculous and the writers point this out in parenthesis “(No need to stir!)” But this is not really what Hugh Hawes suggested with “Does it *nourish* the child’s growing mind?” It is not even what the writers suggest by their own questions: “Is it a balanced diet? ... Is it appetizing? Is it served up in an interesting and enticing way?”(p12). Instead of picking up the image of nourishing the mind with skills to help it grow, or suggesting that the best way of feeding the mind is to ensure it “ingests” a wide variety of information and skills, the writers jump sideways into this image of uncombined raw ingredients. A similar thing happens, as I explained above, with the image of the chain of storytelling tradition and the erosive forces of time. If writers have carefully written out idiomatic language, which has crept back in when they feel strongly about a topic, this has also has implications for the identities they propose for the readers.

It suggests that the readers’ grasp of idiomatic written English is not good; that the writers believe they must write as plainly as they can to make the material accessible. Research supports this: the level of primary school teachers’ English was not good enough to understand grade 5 (standard 3) geography textbooks (Langhan 1993:140). It also suggests the writers’ are concerned that readers will struggle with sophisticated abstract concepts. These they elaborate with concrete comparisons drawn from the readers’ probable everyday domestic duties.

#### **2.2.4.2 Organisational course markers**

Some of the most pervasive metaphors are the sub-titles for sections of the course. Their cumulative effect makes them especially powerful, as they are repeated throughout the course and are presumably used in other exchanges between writers and readers. They may thus achieve that unmarked, invisible quality that Angelil-Carter and Murray (1996) speak of, when a metaphor sinks into the naturalised language associated with a topic. In the *Whole Language Booklet* they are **umthamo**, **face-to-face sessions**, **umkhwezeli** and **key activity**.

**Umthamo.** This word is explained in Umthamo One. It literally means a “mouthful” with the idea that material is delivered in manageable, bite-sized chunks. A figurative

interpretation might be **section** or **unit of work**. In its literal meaning it resonates with the metaphor of feeding described above.

**Face-to-face sessions.** These are meetings between the teacher-learners and the course presenters. The name suggests that their primary aim is personal contact, and is a contrast to the rest of the course which is distance and “faceless.” It suggests that readers are valued individuals who will become personally known to course writers at these sessions. It suggests utilitarian notions of individualism and uniqueness.

**Umkhwezeli.** This word is explained in Course Book 18:

Take the isiXhosa word, khwezela, meaning to keep the fire going. When Tillie was growing up she had been umkhwezeli. Her job at home was to keep an eye on the pot and the fire. But we learned that the word khwezela became associated with activists during the struggle years. Now, in the Distance Education Project, we have taken the word to describe the people who work with you on these materials and activities! (p10)

So the writers deliberately chose to describe presenters with a word reverberating in both traditional and recent political life with responsibility, nurturing, “carrying the torch” into the future and activism in education. It suggests the warmth and life-giving qualities of the educational hearth. It constructs the tutors in terms of a vital if humble female domestic role (young girls are umkhwezeli) with which the readers will identify. In this it suggests an identity similar to that suggested by the metaphor of feeding (p30). It also constructs tutors as inheritors of the political struggle, now carried into the educational arena. This second identity is not gender-related but puts readers on a par with activists in the struggle.

**Key activity.** This word suggests the positive qualities of access and opening as well as the idiomatic sense of *main, most important, crucial*. It suggests that this activity will give the readers understanding to “unlock” other parts of the Umthamo and the course. The verbal significance is underlined visually: key activities are marked by the icon of a key. The identity it suggests for the readers is of academic outsiders: those who have been locked out, but who through these important exercises will gain access.

### 2.2.4.3 Other idiomatic usage

Metaphor is also contained in the choice of nouns and verbs that have become naturalised as “the way to say things.” In the *Whole Language Booklet*, these coalesce firstly around building (and breaking) and secondly around watching (see Appendix 4 p117). Apart from these two clusters the writing is not imagery-driven.

**Building and breaking.** The image of building, of creativity and construction and its opposite, of breaking, creates a more vigorous and masculine identity for the readers than the metaphor of feeding does. This is also a metaphor naturalised in the discourse of education, and suggests the readers are actively involved in creative construction in their classrooms, their community and the educational environment. The fragmenting and breaking up is to be rejected by the readers.

**Watching.** The second cluster of images has to do with watching, seeing and observing. Sometimes readers literally watch their own learners, but mostly it is used figuratively, for example it is suggested that readers will “see the value of working in this way” (p2). Some of the watching is particularly intense (*focus* on) and identifies the readers as acute and perceptive viewers of their world, not passive onlookers.

An examination of the marked and unmarked metaphors reveals that they construct identities for the readers which are lodged in a familiar domestic and rural environment: care-givers, fire-watchers, choir leaders, builders and observers. It seems that they have been chosen for their relevance to the readers and that the writers are careful not to construct readers in unfamiliar roles.

### 2.2.5 Warnings and negatives

Fairclough (1989:188) argues that “negative assertions evoke and reject corresponding positive assertions in the intertextual context.” They suggest a reply in an ongoing debate and “implicitly taking issue with the corresponding positive assertions” (*Ibid*: 154). Intertextuality in other forms (referencing and quotation) used to construct the identities of the writers is dealt with in more detail in Chapter 3.

Warnings and negatives are an indicator of what the writers expect their readers to be like. It suggests an ongoing argument with supposed readers who the writers are trying to “correct.” The writers seem to believe that the readers will not value the whole language approach unless they experience it for themselves. In the introduction the writers assert: “We believe that this is important if you are to understand how this approach works and if you are to see the value of working in this way” (p2). In an italicised, framed interjection they are more explicit about this fear:

We have found in our work with teachers, that if they are asked to try out a particular task or activity with their learners, quite often they do it just that one time. When we were trialling (sic) the Key Activity in the first Mathematics unit, we explained to the Principal of a farm school what we were doing with the learners. “Oh yes,” she said. “I did something like that once with my Grade 1s for an assignment for my FDE. But I haven’t done it since.” But that’s a problem. If we want to see change in education, new ideas need a chance to become part and parcel of the regular work in classrooms.

So we are asking you to repeat this activity. This activity can be an important way of making your language work with your learners more learner-centred, and more integrated. If you carry out this activity more than once, we believe that you will notice some differences in the experiences. The second time you do this, we are sure you that both you and your learners will improve on what you did before, and how you did it.

We also think you are more likely to develop a habit for working in this way if you carry out the activity more than just once. Then it will be more likely to become part of your approach to language work in the classroom (p32).

The passage suggests that the writers believe readers may abandon the approach through laziness or lack of motivation or see it as impractical book-learning. It further suggests possible reasons: Firstly, readers may not truly want change in education or be motivated by a search for the common good. Secondly, readers may not be motivated to experiment and find what works for themselves and their learners. Finally, readers are unlikely to make a striking success of the first lesson, the “conversion experience” which will convince them to incorporate this approach into their teaching.

The writers use negatives in similar exhortatory or motivational passages, implicitly suggesting negative traits for the readers and that the readers lack the qualities writers mention. The revealing use of **more** has this effect, as does the implied negative in conditionals such as “if you” which suggests “if you do not...” Some of the italics and

bolding also suggest negatives (see Appendix 5 p118). For example: “We think that this approach to language teaching will make your language lessons more meaningful and more interesting for both you and your pupils” (p3) implies that readers’ lessons are less meaningful and interesting than they should be. Baldly put, the writers expect the readers to display a series of negative traits: to be uninteresting, unconscientious, unable to design and provide tasks, unable to see value, lacking thoroughness, classroom management skills, focused on the negative, even lacking appropriate interpersonal skills in their own communities.

### **2.3 Conclusion**

The writers seem to construct identities for their readers which cover three aspects of the many identities they might actually have: readers’ private domestic identity, their professional identity as teachers, and their identity as learners on this course. In the comments which follow I shall deal with these separately, while recognising that in the individual these are changing interrelated parts of a dynamic self-concept.

**Readers’ private identity.** A private identity is constructed for readers as middle-aged Xhosa-speaking family women of the Eastern Cape and Border regions. They are still linked to rural communities or have knowledge of traditional rural customs. In this identity as working women they are given positive attributes: leaders, responsible care-givers and providers, busy and concerned.

**Readers’ professional identity as teachers.** The professional context of these readers has already been suggested in Chapter 1 (p7). One can assume that many of them teach in the under-resourced rural Eastern Cape schools described there. As professionals the writers construct an identity for them which has both positive and negative traits. The difficulties of their teaching environment are recognised and they are honoured in that role, but there are also hints that the writers doubt their commitment, as many motivational passages urge the need for real change. They seem to see their readers as professionally lacking.

**Readers’ identity as students on the *Fort Hare Distance Education Project*.** It is in the role of learners that the writers show the greatest concern, constructing for the readers an identity as struggling students greatly in need of support and direction. This identity is

suggested so far mainly by the use of the very directive “you.” The writers’ concern emerges from other features of the text also, and Chapter 3 deals with some of these. As writers’ primary objective is to teach, readers’ shortfalls as students will be most obvious to them and cause them the greatest anxiety. Other aspects of readers’ background which may contribute to writers’ perceptions are their probable schooling and training experiences.

It is likely that middle aged Xhosa women received their education in the Bantu Education system of the apartheid years and that the poor quality of their schooling and training was a “legacy of the apartheid school system that deliberately gave blacks second-class education” (Robinson 2004:44). Chapter 1 (p7) outlined readers’ professional circumstances. In 2000, 26% of teachers in the Eastern Cape were un(der)qualified (Beard and Shindler 2000:138), and as two-thirds of under-qualified educators can be found at primary level (Bot 2000b:2) it is probable that many of the readers are under-qualified, explaining their enrolment in this course. The experiences of their own schooling and possibly inadequate tertiary training may manifest themselves in weak English and in teaching approaches that favour rote learning, silent language classrooms, content rather than skills-based testing and an emphasis on the role of the teacher rather than the learner. Given what has already been said about the probable lack of resources in their communities, many may not have access to much reading material or television and may therefore be unsophisticated readers and viewers. This is a point which chapter 5 returns to.

The writers are not unsympathetic towards the readers or their situation, however. While being directive they also offer support and clarity. The use of **you** therefore functions both to draw the readers into the text by projecting a personal relationship, and to distance readers, as writers direct and order readers’ responses. Kress (1989:25) asserts that “linguistic features can serve different functions at one and the same time,” and that seems to be the case here.

### **2.3.4 Intersecting identities**

In chapter 1 (p11-13) I suggested that writers may create a number of **opposing** identities for their readers, or that there might be an apparent conflict in the identities created. This is not because of a poorly conceived notion of their readership. It reveals instead that these texts are the sites of struggle, negotiation and change. Kress (1989:14) speaks of the way in which texts attempt to resolve apparent differences: “Indeed the task of the author / writer is

precisely this: to attempt to construct a text in which discrepancies, contradictions and disjunctions are bridged, covered over, eliminated.”

Instances of opposing identities suggested by the analysis so far seem to spring from writers’ dual need to project on the one hand their esteem for their readers and on the other to retain a critical professional distance. This expresses for me the central dilemma of the teacher: how to communicate value, respect, closeness and esteem for the learner, yet be maintain sufficiently critical distance from the learners’ product (as examiner, critic and guide) to promote growth. So the writers of the *Whole Language Booklet* negotiate a path between several positions. They suggest that readers’ common life experiences and language are known to and valued by them, but at the same time present the readers as lacking important professional skills. They are also critical of the readers’ commitment as students. The use of **you** is simultaneously distancing and intimate: it enables the writers to assume a bossy, directing tone and at the same time affirm a close personal relationship.

### **2.3.5 Real vs constructed identities**

It is important to remember that the writers of the *Whole Language Booklet* may meet the students in “face-to-face” sessions and trial their materials in their classrooms, as described in Chapter 1, p2. They have accurate, specific knowledge of their readers and good reasons for making the assumptions they do. Scollon & Scollon (1995:89) suggest that writers need to consider two kinds of relationship: the actual relationship between reader and writer, and the implied relationship between reader and writer. The actual writer may have any of a number of face relationships with the reader, but will take on the role of the implied writer, and address a standardised or ideal reader. The writer will want to get as close to the actual readers’ characteristics as possible and the writers of the *Whole Language Booklet* have an opportunity of doing so. In addition the writers of the *Whole Language Booklet* are in control of the publishing (see Chapter 1 p2) and are able to change their coursework books as their readers change. This avoids the complexities peculiar to textbooks and described by Hyland (2000:107) as follows:

Textbooks therefore seem to represent a complex professional discourse that involves the writer in, at least, two dimensions of social interaction: one pedagogic and designed to engage with student consumers and another addressed to colleagues as evaluators.

As the booklets are coursework materials and not published for general sale, there is not a large critical professional audience of colleagues to engage with for these writers. The directness of the writers of the *Whole Language Booklet* and the assumptions they make may be explained by the unusual access of writers to readers.

However, this may produce a problem of its own, at odds with writers' professed intention of teaching for change. If the constructed identities are close to readers' real identities there is a danger that the writers will reinforce stereotypes. Being constructed in text as middle-aged Xhosa matrons, only partially adequate teachers and struggling students may limit readers' views of themselves and retain them in limited identities.

## Chapter Three: “Who are WE?”

The construction of identities explored in Chapter 2 can be expanded by examining the identities writers construct for themselves. Subtly, by establishing their own position, writers construct mirror-image identities for the readers as **what the writers are not**. Ivanič (1998:33) maintains that “the discursal self which writers construct will depend on how they weigh their readers up, and their power relationship with them.” For example, if writers appear confident and directing, they construct identities for the readers as lacking confidence and needing direction. This chapter focuses on the writers and how their identities necessarily add to an understanding of the identities, relationships and roles of the readers already explored in Chapter 2.

Because they have written these coursework booklets, the first assumption that readers can make about the writers of the *Whole Language Booklet* is that they are experts, in this context academics, giving them the right to state and assert. An associated second assumption is that, as presenters of a university degree course, they are teachers, giving them the right to teach and direct. Chapter 3 therefore looks at how the writers present themselves as members of these two professional groups, academics and teachers, and the extent to which they support or subvert conventions which usually establish these roles. Comments on academic conventions have already been made in Chapter 1 (p3-4). This chapter therefore begins by looking at the relationship between knowledge and power before proceeding with the analysis. The analysis has three main sections: naming practices through proper nouns and pronouns, strategies used to assert writers’ authority and strategies used to deprecate their authority.

### 3.1 Knowledge and power

By publishing an article or textbook, writers are already identified by peers as having expert knowledge. The power balance in this kind of relationship is weighted towards the teacher-writer and the academic community they represent. Bernstein (1990:171) asserts that “what goes on in a school: the talk, the values, the rituals, the codes of conduct are biased in favour of a dominant group.”

In academic writing, **knowledge** is the source and indicator of power, status and worth, regardless of the social or institutional standing of the individuals. It is the academic capital which separates the superior knower from the inferior non-knower and therefore defines the relationship between them. Kress (1989:1-2) asserts that “all social interaction involves displays of power; in education this is highlighted through a characteristic conjunction of knowledge and power.” Mentally reproducing the relationships of the classroom, writers may assume that their readers need guidance and instruction, and predicate that kind of relationship with them.

In many cases, students have no choice but to accept the superior-inferior teacher-learner roles constructed in and by learning environments and continued through textbooks and other academic writing. In other cases readers and writers may oppose this construction of the power relationship between them. Hyland (2000:5) suggests that writing is central to disciplines and that “it helps to create those disciplines by influencing how members relate to one another, and by determining who will be regarded as members, who will gain success and **what will count as knowledge**” (my emphasis).

Kress (1989:53) asserts that “the statements of the powerful can count as knowledge by virtue of their power.” In the academic community writers typically assert their power through quotation and use the conventions of academic referencing to support their positions as experts. Conventions of academic referencing will be revisited on p50 below.

## **3.2 The analysis**

### **3.2.1 Naming the writers**

Conventions of academic writing suggest that writers withdraw from the text, but in the *Whole Language Booklet* the writers name themselves, give details of their professional lives, relate their own teaching experiences and even include photographs. In Distance Education materials is however common practice for writers to name themselves and often to include photographs as well (Reed 2004 pers. com). They seem to follow Cook’s (1989:87) advice to language teachers that “it should always be ascertained that students know as much as necessary about the identity of the receiver **or sender** of the discourse” (my emphasis). The writers are:

- Tillie, named eight times (p10, 14, 16). Her photograph appears on page 17.
- Alan (Kenyon) named on page 10.
- Viv (Kenyon) named on page 22.

This makes the writers very “visible” in the text, with a strong presence. Contributors are also named in the booklet. When Tillie relates the story of how she tracked down the intsoni behind the saying “the river which drowns all liars” she identifies each contributor by name and adds personal and circumstantial detail:

- Tillie’s sister-in-law Lulu Maholwqana and her photograph (p17).
- Mr Caga and his photograph. We are told he “had been a teacher of isiXhosa, and who is now an inspector of schools.” “His age fits the era when we read the story in our Xhosa readers in the lower primary classes. The only thing he remembered was that there was a version of this story in a booklet which was one of the Stewart Readers” (p17).
- Miss Kolisa Ngodwane, “who has been a Maths and Science teacher.” (p18) and her photograph. She is referred to a second time as Kolisa.
- Mr Hinta Siwisa, “an attorney” and his photograph (p18). He is referred to a second time as Mr Siwisa.
- “The Minister of Sport, Steve Tshwete” and his photograph (p18). He is referred to another three times and the intsoni is called “Steve Tshwete’s version.”
- Anise Waljee, “someone from Tanzania,” (p22) a student or colleague of Viv Kenyon’s.

The detailed naming of the writers and contributors has a number of effects. Firstly there is the assumption that the readers may know contributors, especially Mr Caga, perhaps Mr Siwisa, and certainly the late Steve Tshwete, as all three have Eastern Cape roots. If the readers do not know them, the photographs and details present a community into which the readers will fit in time. It also suggests the collaborative nature of the Fort Hare Distance Education project. This creates an identity for the readers as initiates, or newcomers to a group some of whom they may already know. Their opportunity to join the group is made clear when they are also invited to contribute: “Do you know any other or different versions of this story? If you do, please write out the version you know...” (p21). Their name and photograph might then be included with those of local dignitaries.

Secondly, naming contributors in this way identifies the writers as people of local knowledge and influence. The contexts in which writers are named also seems to confirm them as experts – attending conferences, going out to find intsoni, and meeting Steve Tshwete: they have enough influence to persuade a Minister to take time off and tell them a children’s story.

Thirdly, naming contributors in this way creates a narrative, a story in which writers and others appear as characters. The effect of narrative is dealt with in more detail on p56. Here are the opening lines of these narrative-like passages:

- “When Tillie was in Australia...” (p10). This account lasts for two pages, telling of the benefits of the whole language approach to Australian learners.
- “We remember talking to Hugh Hawes a few years ago” (p12). This introduces the idea that children should receive a mixed diet of educational experiences and skills.
- **“The story of how Tillie collected this intsoni.** We wanted to include a story in this Umthamo, but we wanted to include a story that was not one of the best known stories” (p16). This recounts Tillie’s search for a traditional tale of which she only knew the idiom. It covers more than two pages.
- “When Viv was doing some research about using stories in classrooms...” (p22). This illustrates how many elderly people it might be necessary to contact to get a complete story.
- “We have found in our work with teachers...” (p32). This story illustrates the dangers of backsliding and is used as an opportunity to present a moral: “If you carry out this activity more than once, we believe that you will notice some differences in the experiences” (*Ibid.*).

Fourthly, by establishing their own individuality, writers suggest that the individuality of the readers will be valued, again suggesting the individualistic principles of utilitarianism.

The effect of these passages is reassuring. Instead of a distant, formal academic argument, material is presented in a series of story-units, with the writers named like familiar characters. It suggests an identity for the writers as kindly, supportive and welcoming. It may pick up on the relationship established by them in the face-to-face sessions. It also suggests that the readers are unsophisticated students more at home with simple narrative-like structures than academic ones, who need the reassurance of this personal style and learning context. It suggests that they will be welcomed as group members.

### **3.2.2 Naming the writers through pronouns**

#### **3.2.2.1 We (and us)**

Having provided the readers with names and in some cases photographs in informal narrative contexts, the writers continue to insert themselves into the text through the personal pronoun **we**. The majority (35) of the 50 uses of **we** in the *Whole Language Booklet* refer to the

authors. As it is written by two authors and an editor, this is a literal plural, not a vague, masking device. Chapter 2 listed uses of **we** which include the readers. **We** also refers to the following groups which exclude the readers: Firstly, **we** refers to the writers and presenters of the course. This usage suggests an assertive presence for the writers. For example: “At the last face-to-face session of the first semester, you were given a tape-recorder, and we asked you to use it to tape-record a story...” (p 22). Secondly **we** refers to the writers backed up by academic theory and thought. For example “We suggest that this is unnatural...” (p 2).

### **3.2.2.2 One**

The use of **we** (and **you**) is so common in the *Whole Language Booklet* that a sudden single use of **one** is surprising: “One really wonders why we split up the school day into all those neat little 30 minute periods?” (p13). Here the writers seem to retreat into formal facelessness as if they are reluctant to criticise a practice their readers may be involved in.

### **3.2.2.3 I (First person singular)**

At two points in the *Whole Language Booklet* the writers present themselves in the even more immediate first person singular, **I**, accompanied by her name: Tillie. “When Tillie was in South Australia she was very impressed by the way in which the teachers in Grades 1 to 7 integrated the different learning areas” (p10). Later she is joined: “At the conference that Tillie and Alan and John Bartlett attended in Adelaide...” (*Ibid.*). Tillie appears as a character in the narrative (p14) when she tries to discover the story behind an idiom. Her experience appears under the title “The story of how Tillie collected this intsoni” (p16). After an introduction, she tells it in the first person: “What I still remember in the story I want to tell... I’m not sure what happened or led the two to talk about a jackal...” The narrative is accompanied by photographs of Tillie and everyone she consulted in her research. I will return to these photographs in Chapter 5.

In this way the writers make the usually vague **we** absolutely specific. By identifying one of the writers by first name and giving her a clear identity and voice of her own for a number of pages, a sense of personal contact is created. The other writer, Viv, is similarly made part of the story (p 22), although the account is shorter. By creating a personal face for themselves, the writers seem to be assuring readers that they are similarly valued as individuals.

### 3.2.3 Being assertive: Imperatives, questions, statements

#### 3.2.3.1 Imperatives: the power to order

Imperatives assert the right of the writer to direct and possibly to penalise. Hyland (2000:126) suggests that

the most obvious manifestation of how writers negotiate an asymmetrical relationship of competence, however, is through the use of relational markers ... These allow writers to intervene directly into the discourse to address readers directly.

The examples he gives are questions and imperatives, which he suggests display authority and create a relationship in the text which replicates classroom interaction. In the *Whole Language Booklet*, imperatives are one of the most commonly used structures (89 examples in 18 pages) and their effect is direct and directive. In addition, they are often grouped together and the cumulative effect is strongly authoritative. The following example appears as the first of five paragraphs of continuous imperatives:

Now take a clean sheet of paper, and write the date and time. Then think of any questions that you have about this story, and make a list of all your questions. Try to **think** of questions about what might have happened before this story began... *Don't write* down questions as if you are testing your own **reading** (p14).

The Intended Outcomes on page 3, the instructions on pages 22, 25, 26, 27 and 28 and the activity on page 32 are the same: paragraphs and pages of paragraphs of imperatives, often with the additional emphasis of italics or bolding. The context however is always and only that of giving directions about lessons or assignments, where they are both appropriate and necessary. In a coursework booklet large sections are inevitably given over to such instructions, as the writers have limited contact with students. The effect is of writers who seem anxious not to leave anything to chance. It suggests they believe their readers need strong guidance through even basic instructions, to the extent of saying "Open your Journal. Write the date and time" (p26). The writers may be responding to their readers' probable educational experiences, as suggested in Chapter 2 p35.

The movement from the more relaxed narrative (of collecting intsoni for example) which sets the scene and provides background, to the vigorously authoritative instructions of the

activities and assignments provides a sharp contrast. It suggests a mental rolling up of the sleeves for action and the urgent need to follow these step-by-step directions. It suggests that the writers are negotiating between their need to take either a cooperative or a coercive position appropriate to different sections of the course.

### 3.2.3.2 Questions: the power to ask

Questions may have a dual effect on the receiver: a question can be a sign of interest, of concern and an attempt at closeness, especially in direct conversation. It can also be a distancing device if the topic or tone is offensive or invasive. The right and authority to ask, as well as what one may ask about, is a power issue and will govern what is asked and how. A teacher's question can also compel a learner to an act: answering, and in a classroom it thus expresses the power to order and direct. In a textbook a question can similarly compel the reader to respond. In a relationship constructed in a written text the uneven nature of the relationship is accentuated by questions, which must all to a greater or lesser extent be rhetorical. Apart from written answers, readers have no chance to oppose, agree or to have their opinion valued. Hyland (2000:129) suggests that

By asking (mainly rhetorical) questions, varying their degree of certainty, confidently evaluating the assertions of others, issuing directives, providing definitions and leading readers to particular interpretations of material, writers massively intervene in these texts to constitute themselves as experts. ... The constitution of one participant in the interaction as an expert, however, is also a simultaneous construction of some other participants as less expert. In selecting these metadiscourse options to address different audiences, writers define one of these audiences as novices, subscribing to the 'apprenticeship' metaphor, which may also underlie many of the classrooms where the texts will be read.

In the *Whole Language Booklet* the 49 rhetorical questions, like the imperatives, are often grouped in paragraphs, mostly in the context of activities and assignments, and contrast sharply with the narrative style of other sections. Paragraphs of questions also often follow paragraphs of imperatives. This seems to create a text in which the writers keep strong control of the interaction. The questions may be guided writing, but this is not clear, for example:

**“Reading** - First of all **think** about your **reading**. When did you **read**? Did you only **read** when you first worked with the passage? Did you go back and **re-read** at any time? What did you **re-read** and why? Did you **re-read**

because you didn't understand something? Or because something caught your interest? Or did you **re-read** because you wanted to check something?" (p15).

Only five questions do not appear as part of the instructions for activities or assignments (see Appendix 10 p127). The first tries to lead readers to a conclusion and is rhetorical, another two introduce a new section. A fourth guides the readers in self-assessment and only the last is an interactive question which might elicit a reply.

With regard to both imperatives and questions, Kress and van Leeuwen (1996:147) suggest that it is essentially the **lack of reciprocity** between the choices available to each party in an exchange that causes the power relationship:

In writing, as in unmediated communication generally, the absence of a writer causes, from the start, a fundamental lack of reciprocity (you cannot talk back to the writer), but also because the writer and the reader are often unequal in a number of other ways. The reader may be addressed directly, by means of the second-person pronoun *you*, while the writer hides behind impersonal forms. ... Imperatives may be used, as modulated processes predicated of the reader (*you can, you should, you need, etc*), while such forms are not used of the writer.

The way writers of the *Whole Language Booklet* use questions suggests that they do "massively intervene ... to constitute themselves as experts," (Hyland 2000:129) but only when they are clarifying requirements for readers' written responses. In other contexts they do not use questions to assert their authority, relying instead on other strategies.

### 3.2.3.3 Stating a rule

I suggested earlier that readers might assume that writers are experts and that they therefore have the right to assert, claim and state. In the Whole Language Approach booklet however there are only ten examples of a scientific, third person, disengaged, factual style (see Appendix 6 p120). For example: "This approach to language learning and teaching does not divide language into different parts. It is about the links between **all** aspects of language" (p2). Ten examples show how sparingly general rules are stated in the *Whole Language Booklet*. They seem to be used in contexts where the writers justify a position or explain an enthusiasm. The claims they want to put beyond question refer to accepted academic thought, such as defining a whole language approach, or redefining literature to include oral literature. Others are claims based on common sense observation, such as that separating

subjects in high schools has filtered down into primary schools. Still others are claims based on strongly held personal beliefs.

Writers seem reluctant to use this structure and often withdraw from its authoritative position: six of the ten claims are hedged by conditionals, modals or personal pronouns, italicised in the following example (also Appendix 7 p121) “To focus on, and to build on the strengths of learners is a good way of working. Emphasising and developing strengths builds confidence. *If we focus on what learners **can** do...*” (p36). It seems they do not wish to present themselves too obviously as experts and may be trying to keep the egalitarian tone established by naming practices and the inclusive use of **we**.

### **3.2.4 Being deferential: Modality, conditionals and giving choices**

#### **3.2.4.1 Modality**

By expressing different levels of obligation and expectation, modality and modal verbs create both politeness and formality and its opposite. “In English we often give orders, and make requests and pleas in the form of elaborate questions (‘Would you mind...’) which give the option of refusal” (Fairclough 1989:33). The social conventions governing modal verbs make them important constructors of power relationships. Modal verbs can indicate whether the writer considers the reader an equal worthy of respect and consideration. Kress (1989:26) points out that modality also marks that which is objectively known from that which is still subject to speculation or doubt. They are therefore a way in which writers show that they can and do distinguish types of knowledge. The words **could, might, can, may**, suggest different levels of certainty or uncertainty and mask the obligation of the reader to respond. They may also suggest that readers have an option or that the writer is unsure of the readers’ reaction. On the other hand the modal verbs **must** and **should** suggest the weight of obligation.

Two other aspects of modal verbs may provide insight into the identities being constructed for the reader. Firstly, the extent to which modals are used: how formal are the writers trying to be? Secondly, context may provide insight: what do the writers think they should be formal about? Avoiding modals contributes to a vigorous, direct and directing style of writing, so the study of modals can be added to an examination of other verbs, especially imperatives which are discussed on p42.

In the Fort Hare materials there is very low use of modal verbs. This suggests that the writers are constructing for themselves a confident identity as people who have the right and ability to direct and instruct others. The mirror-image of this identity is therefore constructed for the readers, as learners who need direction, lack confidence and perhaps also ability.

Many of the modal verbs in the *Whole Language Booklet* refer to third parties (Appendix 8.1 p122). This means that of the few modal verbs in the text, fewer still (24 in total) are addressed to the readers (Appendix 8.2 p123). The contexts in which they appear are also fairly limited. The greatest number of uses (14) is of **can** and **could** to give choices either in readers' lesson planning or in their assignments. The modal **may** is used similarly in another three contexts. For example "What would happen *next* in your class, if you were to adapt this activity for you learners? You could tell or read the rest of the story. Or you could ask your learners to write their *own* versions of how the story might go" (p16). Lesson planning and assignments are therefore the two areas in which the writers are prepared to hand over some responsibility, but these are not an open invitation to free creativity. Choice is discussed further on p50.

**May** also suggests that the writers are withdrawing from a potentially accusing statement. For example, they seem to avoid making assumptions about the ignorance of their students: "It may be new to some teachers" (p2). In another instance they do not want to be associated with possible failure: "You may realise that there are some things that your learners cannot yet do" (p36). In another two instances **should** is used to convey a sense of obligation: "We suggested that you should go to an elderly somebody in the community" (p22).

These writers seem not use modality to express politeness and formality. As modal verbs are notoriously difficult for second language speakers to master, this choice may be a pragmatic one. It also seems that writers have chosen the students' work and the choices they must make almost exclusively as the sites of modality. The overall effect is of writers happy and able to take charge and assert themselves in this teaching context.

### 3.2.4.2 Conditionals

Conditionals also contribute to the modality of the text. They may signal that the writers are hesitant or diffident about the topic under discussion. As mentioned before, the overall impression of the *Whole Language Booklet* is one of confidence and authoritativeness. Like modal verbs, conditionals are not much used, and when they are they seem to be used a small range of interpersonal purposes.

The conditional used most is **if**, (see Appendix 9 p125) which is used in three main contexts. The first and commonest use is **if you**, referring to readers' assignments and suggesting that the writers cannot rely on them to conduct the research in the most efficient and effective way possible. For example: "If you do this during the holiday, it will save time next term" (p22), and "If you approach them in an appropriate manner, you will be able to collect your data" (p25). Other uses suggest that the writers are not sure if the readers are committed to the course and the changes it will bring about in their teaching: "If you are to understand how this approach works and if you are to see the value of working in this way" (p2), and "... you are more likely to develop a habit for working in this way if you carry out this activity more than just once" (p32). Others acknowledge readers' difficulties: "If you have a very big class, this could be quite expensive, especially if your school does not have copying facilities" (p27).

A second use of the conditional is **if they**, or sometimes **if the xxx**, where the person referred to is either a learner or a contributor to the insomni research. In these two contexts the writers withdraw slightly and acknowledge the likelihood of things not going entirely to plan. Finally there is **if we**, which draws the readers into an ideal future: "If we want our children to grow up into truly whole human beings ..." (p12).

Other conditionals (**seem, probably, maybe, perhaps, possible**) are used equally sparingly (Appendix 9 p125). Two suggest an ideal: "Perhaps it would be better to integrate the different *aspects* of learning areas..." (p12) and "Perhaps we need to think of the school curriculum in the same way" (*Ibid*). The writers seem to use their apparent hesitation to draw readers with them along a desired line of thinking.

Of the remainder, some conditionals are speculative statements about third parties: “They [the learners Tillie observed in Australia] seemed to have picked up the idea that people may disagree for some good reasons” (p10). Others suggest that learners should be given some leeway: “... together think of some probable answers to those questions” (p15). One gives teacher-learners a hint of independence in an assignment: “... and perhaps something which indicates why you chose this person” (p26). Another asks them think of a creative solution to learners’ problems: “Perhaps you can think of ways to encourage them to develop the skills, and give them the understanding they seem to need” (p36).

Finally, conditionals are used to speculate about the roles and lifestyle of the readers. Here the writers know their observations may not apply equally to all their students, and hedge their assumptions (referred to in Chapter 2):

You probably have lots of different jobs or roles to play. Maybe you are a mother, a wife and a housekeeper, as well as a teacher. Maybe you also have certain other jobs to do in your community. ... And often the other ‘unofficial’ jobs that you do, help you to do your job as a teacher even better. We sometimes have regular times to do certain things (p12).

By keeping their use of conditionals and modal verbs to the minimum, the writers maintain a confident authoritative tone. Although this seems at variance with the writers’ apparent desire to present themselves through pronouns and naming as informal and approachable, they present themselves as people who know what they are talking about and who do not really expect to be questioned. It seems that they have chosen these linguistic items rather than referencing and academic allusions (referred to on p51 below) to establish themselves as experts. This choice may have been suggested by the likelihood that their students would not understand (and therefore might be oblivious of) the subtleties of establishing credentials in ways usual in the academic community. Also, establishing their “right to speak” through linguistic items rather than other strategies means that they permeate the fabric of the text with their confident voices and presence. At the same time they construct identities for the readers as students who need this kind of guidance and control. They are students who will respond well to firm authoritative directions, need few options and no uncertainty.

### 3.2.4.3 Giving a choice

Most of the directions in the course are voiced positively and firmly, using the strings of imperatives discussed above. Where choices are offered they are between two clearly worked out options and are given near the end of the booklet. For example:

Then you need to make decisions about how much of the story you will give your learners. The idea is to give them a small part of the story, so that they have to **think** about what might follow. You want to give them just enough so that they will have questions burning in their minds. Each story will be different. You may be able to use the first two paragraphs, or you may need to use the first three. But **you** will have to decide (p27).

However these are not real choices: they are variations on a course determined by the writers, and shaped by them to restrict readers' responses. These limitations might be a response to four factors. Firstly, there is the problem of assessing non-equivalent assignments, if assessment is involved. Secondly, there is the problem that if exercises are not clearly shaped, the value of repetition may be lost. The writers make it clear that they value repetition: "You are more likely to develop a habit for working in this way if you carry out the activity more than just once. Then it will be more likely to become part of your approach to language work in the classroom" (p32). Thirdly, there is the problem that readers may not have enough time to experiment and rework lessons. Finally, without this support readers might not produce a viable lesson. Clear structure should ensure success, and make readers more likely to change to this teaching approach.

Limiting choices in this way creates a problem of its own, however. Lewis and Spencer in Rowntree (1992:61) suggest that one of the key features of open learning is "a commitment to helping the learner to acquire independence and autonomy." The social psychologist Vygotsky suggested that teaching should help the learner to move on a continuum from the familiar to the unfamiliar, and this principle is widely adopted. A choice between two carefully worked out options may restrict readers to the realm of the familiar. Their ability to operate as independent creative educators may ultimately be limited, and they may believe that it is not possible or appropriate for them to create variations of their own. Hyland (2000:105) suggests that for many students text books "also provide a model of literacy practices, how the discipline states what it knows." It may be counter-productive to limit these literacy practices too much.

It is important to mention that in the introduction readers are given a significant **conceptual** choice: “we are going to look at a way of teaching language which fits in with Outcomes Based Education (OBE)” (p2). The text box adds: “There are different approaches to teaching and learning. Many colleges of education tend to teach just one” (*Ibid.*). The implication that readers can reject this approach may be lost in the assertive style of the whole booklet, but the suggestion is still there that the readers can choose.

### **3.2.5 Writers as academics**

#### **3.2.5.1 Intertextual references**

The notion that all texts are embedded in other texts and refer subtly to them is explained by Fairclough (1989:152):

Discourses and the texts which occur within them have histories, they belong to historical series, and the interpretation of intertextual context is a matter of deciding which series a text belongs to, and therefore what can be taken as common ground for participants or *presupposed*.”

In academic writing intertextuality takes a particular form: reference and citation. Hyland (2000:22) emphasises that “new work had to be embedded in a community-generated literature to demonstrate its relevance and importance.” Hyland (2000:37) comments that quoting and citation “helps to demonstrate accommodation to this community of knowledge ... [and] establish a common perspective on the reliability of the claims one reports” (*Ibid.*).

Intertextual referencing in the form of quotation is therefore an indicator of how the writers construct themselves as experts and academics. In the *Whole Language Booklet*, writers seem to avoid quotations and academic referencing conventions except where absolutely necessary. The booklet opens with a conventionally referenced quotation from “(Chadwick, NK 1939:77 quoted in Finnegan 1970: 15-16)” (p2), justifying the use of oral literature for the purpose of teaching. There is also an extensive reading passage at the end of the booklet which explains the Whole Language Approach. They prefer to blend other quotations into narratives, for example:

We remember talking to Hugh Hawes a few years ago. He was at a special workshop in Cape Town on the Child-to-Child approach to health education. Lots of different people were there. There were people from Early Childhood [ECD]. There were people from Health Departments. There were doctors and teachers, community workers and people from youth organisations. Hugh Hawes said that a good question to ask about any Primary Curriculum is, ‘Does it *nourish* the child’s growing mind?’ (p12).

The accompanying text box explains “Hugh Hawes is well known for his book ‘Curriculum and Reality in African Primary Schools’ (1979) (*Ibid*). The writers could have quoted and referenced this according to academic convention, but they chose to embed it in circumstantial detail like the beginning of a story, yet including a title for any academic readers who wish to check the details. The second example of this strategy appears in the final summary. As a strong conclusion they write: “Margaret Spencer (Emeritus Professor, University of London) always says, ‘Tell the children that they’re *wonderful*, and they’ll be even more wonderful!’” (p36). There is no reference and it has been presented in a deliberately un-academic way. The phrase **always says** with an exclamation mark, suggests an anecdote: “Aunt Mabel always says ...!”

This suggests that while writers are reluctant to construct themselves too obviously as omniscient academics, they do use the conventions of citation at key moments where it has the usual effect of establishing them as experts.

### 3.2.5.2 Other references

As well as conventionally and unconventionally presented quotations, the writers of the *Whole Language Booklet* refer to several situations in ways which suggest their status as knowledgeable and influential people (Appendix 12 p129). For example they assert that “Many colleges of education tend to teach just one [teaching approach]” (p2) suggesting that the writers are more knowledgeable than other course designers. “Our global village” (p2) claims the international community as their own. The account of Tillie’s visit to Australia establishes her as an international conference goer in the same way that talking to Hugh Hawes establishes the other writers’ importance in a community of “doctors and teachers, community workers and people from youth organizations” (p12) and others. (They make Hugh Hawes’ importance clear by mentioning the book he wrote). Then there is the cachet

of getting Steve Tshwete to give a version of a story. These references establish the writers as people of influence in the political and social arenas as well as the educational one.

### 3.2.6 Narrative Structure

As well as using quotations and referencing sparingly, writers of the *Whole Language Booklet* avoid where possible the abstract proposal and counter-argument structure common to academic texts. Instead they favour a simple narrative, and the booklet is made up of a series of such narratives:

**“Unit 2 – Moving towards an integrated Curriculum”** starts: “When Tillie was in South Australia in September 1998, she ...” (p 10). The narrative about meeting and talking to Hugh Hawes quoted above belongs to this unit.

**“Unit 3 – Experiencing a Whole Language Approach”** starts: “In this unit we are going to start by giving you something to do...” (p14). Activity 4 starts “When Tillie was trying to recover the story behind an idiom, she heard Steve Tshwete telling this version of the story” (*Ibid*). The unit includes the two-page account of Tillie approaching different people for their versions of the intsoni. A third narrative stresses the importance of using many different sources: “When Viv was doing some research about using stories in classrooms, she was studying with someone from Tanzania, Anise Waljee...” (p22).

**“Unit 4 – Introducing a Literature-based Whole Language Approach in a Primary Classroom”** starts: “In Activity 5, we asked you to collect several versions of an intsoni, a traditional tale, or story behind a saying or idiom. In this Unit of this Umthamo, we are going to ask you to think of *another* saying or idiom...” (p25). This unit has less narrative in it, and is mainly instructions on how to proceed with the activity. It does include a warning framed as a narrative:

We have found in our work with teachers, that if they are asked to try out a particular task or activity with their learners, quite often they do it just that one time. When we were trialling the Key Activity in the first mathematics umthamo, we explained to the Principal of a farm school what we were doing with the learners... (p32).

If part of the purpose of such a course is to induct readers into academic discourse, however, the writers will be doing them a disservice. Hyland (2000:105) maintains that textbooks “for many students, also provide a model of literacy practices, how the discipline states what it knows.” A course made up of a series of stories may lock the readers in this particular genre, and not increase their familiarity with academic writing. There are two counter-arguments to this position. The first counter-argument is that the *Whole Language Booklet* is Booklet 9 and begins a continuum of increasingly complex academic texts. Booklet 33 contains seven lengthier quotations (up to three A4 pages) from Freire, Graham, Chambers, Meek, Walkerdine, Bloch, and Cairney. Booklet 41 contains the article “A Vygotskian approach to evaluation in foreign language learning contexts” by Mattos. The second counter-argument is that the course is training practitioners, not academics. It is skills-based rather than knowledge-based: there is little new information, but a lot of consolidation and repetition. Its prime aim therefore seems to be producing skilled practitioners rather than future academics.

### **3.3 Conclusion**

The writers seem to construct for themselves an identity which covers two aspects of their relationship with the readers: that of teacher-academic, which I detail in 3.3.1 below, and that of friend, mentor and guide (3.3.2). These in turn construct a particular kinds of identities for the readers.

#### **3.3.1 Writers’ identity as academics**

Thesen (1994:4) refers to how writers “make themselves visible in academic writing. The distinction between personal and impersonal styles seems to flow logically from this focus.” The writers of the *Whole Language Booklet* seem to have chosen to establish their expertise in a personal style without conventional referencing and formal academic language. It would be naïve to suggest that there is no power difference or that a hierarchy does not exist in this teacher-learner situation. For this reason writers still have to assert the “right to speak” to their student readership and have included references and citations, but embedded in narrative. They have also included personal details which show that they are part of a national and international community of high-ranking educational professionals. However they seem reluctant to be too assertive of their rank and power in this role. On a subtle level this creates an identity for their readers as novices in the academic community, but novices

not very far from the status of the writers. The readers are not reluctant to assert their expert stance when teaching or giving directions for activities however. In these contexts, imperatives and rhetorical questions drive the interaction and establish the writers as confident, assertive and capable teachers. The intersection of modesty and assertiveness suggests that the writers' authoritativeness may stem from an understanding of readers' difficulties and be an attempt to give clear support and guidance in contexts where readers need it.

### **3.3.2 Writers' identity as friends and mentors**

Writers of the *Whole Language Booklet* seem reluctant to sound distant and academic. This appears in the text in a personal **we – you** relationship, using narrative, imperatives and questions. There is an egalitarian down-playing of the status differences between them which suggests their wish to reassure their readers, and to make learning a cooperative rather than a coercive venture between them. They may have taken this position to counter readers' historical distrust of book learning, of experts, of universities and perhaps of tutors. However, this means that while imperatives and questions avoid formality these structures may also appear bossy and directive. Secondly they seem to favour narrative structures on a number of levels. This makes the text accessible and reassuring, and once again suggests that readers are non-academic, needing careful support and guidance through simplified texts presented in a familiar structure.

Writers' withdrawal from overtly authoritarian or authoritative roles can be understood in terms of the egalitarian principles of utilitarianism. It may also stem from their reluctance to present themselves in a way which aligns too closely with the authoritarianism of apartheid South Africa. In asserting writer-reader equality linguistically, they seem to claim a new and democratic voice for themselves, more suited to the position of educators in post-apartheid South Africa. There is a complex intersection of roles as writers apparently desire to present themselves through pronouns and naming as informal and approachable, but use imperatives to claim the position of writers who know what they are talking about and whose instructions carry authority.

## Chapter Four: Constructing the relationship

In this chapter I suggest a more subtle construction of identities by focusing on the extent to which writers feel obliged to be polite, considerate or deferential to their readers, using the work of Scollon and Scollon (1995) on “politeness.” This analysis focuses on the writer-reader relationship, adding a third dimension to readers’ identities.

### 4.1 Introduction

In the account which follows I first look at the writer-reader relationship in distance courses and then explain politeness strategies. I suggest reasons for my choice of the strategies I will be focusing on, and proceed with the analysis.

#### 4.1.1 Writer-reader relationships in distance courses

One of the key philosophies of open education which filters through into distance education, is that it is learner-centered. Rowntree (1992:38) suggests that: “Open learning – more than other kinds of learning – is supposed to be learner-centered.” He later makes this explicit by remarking:

Unlike the author of a textbook, the package writer cannot usually assume there'll be a teacher hovering in the vicinity, guiding the learners about which sections to work on, giving help with the difficult bits and checking on how well they are learning. Therefore, the package must do the teaching itself. ... The package contains a teacher in a state of suspended animation. Once the learner opens the package, that teacher is instantly at their service. Here are some things that learners have told me they expect (*Ibid.*: 125)

An implication of learner-centered education is that it readjusts traditional classroom-based relationships, and this is more so in materials designed for self-study. Rowntree (1992:43) observes that “Even if access is unimpeded, open learning materials can alienate some learners if they think the writers regard them as inferior or invisible.” Here is a crucial issue for writers of self-study materials: they cannot assume a lowly status for their readers. Such readers may be older and perhaps qualified already, more usefully viewed as **consumers** than receivers of the course. Writers may need to appear more respectful, considerate and caring and to use strategies which communicate this to their readers. The writers of the *Whole*

*Language Booklet* seem to have a relationship with this kind of adult, professional distance audience in mind.

#### **4.1.2 Politeness: the concept and its history**

It is an obvious feature of social interaction that we are likely to be considerate of those we esteem, making efforts to protect their feelings and sending signals of our good-will towards them. Where we do not esteem the receiver of our message, we may be much less scrupulous. The efforts we make in this regard appear to be statements about others, but they also declare our own position. Chick (1985:312) speaks of “balancing the desire to maintain face oneself against the need to preserve the face of others.”

Politeness as a principle of communication is first explored by Goffman (in Hudson 1980:115) who refers to “face-work.” Brown and Levinson (in Hudson 1980:115) focus on the efforts made by senders to “save the face” of receivers, using the term “face strategies” as well as “politeness” to refer to their strategies. Brown and Levinson (in Hudson 1980:115) also acknowledge Grice’s work on the “cooperative principle” of communication, which describes the efforts both receivers and senders make to understand and to be understood. For senders this means that “all adults at least are aware of the need for speakers to make concessions to those whom they address” (Hudson 1980:115). We know these concessions as “politeness,” a notion summarised by Holmes (1992:296).

Generally speaking politeness involves taking account of the feeling of others. A polite person makes others feel comfortable. Being linguistically polite involves speaking to people appropriately in light of their relationship to you.

Focusing on the efforts made by senders, Brown and Levinson (in Hudson 1980:115) suggest that they make a crucial decision on whether to emphasise the social closeness or the social distance of the relationship. They name these options “positive politeness strategies” and “negative politeness strategies.” In Westernised conventions, positive politeness strategies emphasise social closeness, shared attitudes and values, solidarity and equality and may display “informal” naming and lexical choices. Negative politeness strategies emphasise social distance and hierarchy by paying people respect, being deferential and avoiding intrusiveness. Lexical and naming choices may be more formal. These can be represented diagrammatically as conceptual clusters:

Conceptual clusters of positive and negative politeness strategies:



Scollon and Scollon (1995) develop the ideas of Brown and Levinson, talking of politeness rather than face and referring to positive politeness strategies as involvement strategies and negative politeness strategies as independence strategies. For this study I use the terminology of Scollon and Scollon (1995): politeness, involvement and independence, although quotes may refer to politeness and face interchangeably.

Cultural, socio-economic or generational differences between senders and receivers may add complex nuances to the perceived politeness of an exchange, and research shows that notions of politeness are highly culturally specific (Holmes 1992). It also appears that a group may

choose either independence or involvement strategies as the “default” form which signals politeness most appropriately. Using the example of Western and Eastern societies, Holmes (1992:303) maintains that

Norms of Western address usage have changed over time to place more emphasis on solidarity and less on status. But this is not the case universally. In many Eastern and Asian societies, the emphasis remains on status differences. Being polite involves using language which recognises relative status very explicitly.

The constant negotiation of position can lead to considerable linguistic complexity. Research shows that in expressing politeness, senders make linguistic choices which interact in a complex way. It is important to note for example that involvement and independence strategies can be scattered through a text, or combined in the same phrase and create balance within the smaller unit. The same linguistic item can be used to express apparently contradictory functions. Holmes (1992:321) summarises this phenomenon by saying:

Many linguistic forms have complex functions. ...They are used differently in different contexts. They mean different things according to their pronunciation, their position in the utterance, what kind of speech they are modifying, and who is using them to whom in what context.

Writers of textbooks, unlike speakers in an oral exchange, have no opportunity of adjusting strategies as the communication progresses. They must make early decisions about their audience, such as those recounted in Chapter 2, and carry them through the whole work. In a textbook, too many involvement strategies would produce the “nanny writer,” who states the obvious and risks appearing patronising or interfering. Too many independence strategies would produce distant, formal communication which may give a distance learner too little support. Politeness strategies therefore suggest writers’ view of what a desirable relationship with their readers might be. Scollon and Scollon (1995:49) assert:

There is no non-hierarchical communication. This is because any difference in sense of hierarchy gives rise to difficulties in selecting face strategies, and any miscalculation in face strategies gives rise to feelings of power differences. ... The characteristics of the communication of face make it inevitable that power (that is, hierarchy) is interrelated to politeness levels.

As the *Whole Language Booklet* writers meet their readers at “face-to-face” sessions, writers’ actual relationship may also affect their “virtual” relationship with readers. Politeness

strategies are indicators of whether the writer considers the reader an equal worthy of respect and consideration. This aspect of politeness is the focus of this chapter.

#### 4.1.3 Strategies for establishing and maintaining politeness

Politeness strategies manifest themselves in every exchange. What we call “politeness” means creating and holding a delicate balance between showing concern and interest, through “involvement” and respect for the other’s freedom to act and speak, through “independence.” Scollon and Scollon (1995:36) explain this as follows:

On the one hand, in human interactions we have a need to be involved with other participants and to show them our involvement. On the other hand, we need to maintain some degree of independence from other participants and to show them that we respect their independence. These two sides of face, involvement and independence, produce an inherently paradoxical situation in all communication, in that *both* aspects of face must be projected simultaneously in any communication.

Involvement is any indication that the writer asserts a close connection to the reader. Although Scollon and Scollon’s (1995:40) work is on spoken exchanges, the following strategies apply to the *Whole Language Booklet*:

- Using the hearer’s language or dialect
- Claiming in-group membership or common point of view
- Exaggerated interest in the reader
- Indicating that you know the (reader’s) wants and are taking them into account
- Asserting or assuming reciprocity.

To this list I add two strategies not itemised by Scollon and Scollon: **bolding and italics**, and **narrative structures**. I suggest my reasons for including these on p66.

Independence strategies emphasise the individuality of others. Scollon and Scollon (1995:41) suggest six strategies which can apply to written texts, and of those, these three do not appear in the *Whole Language Booklet*:

- Dissociate speaker and hearer from the discourse
- State a general rule
- Give the reader the option not to do something.

I therefore discuss the following under independence strategies:

- Using family names and titles seems to be used as both an involvement and an independence strategy
- Apologise
- Minimise threat.

## **4.2 The analysis**

In the analysis that follows I examine first the use of involvement strategies, and then turn to independence strategies, starting with a summary of the three strategies not used. I then look at the use of family names or titles before proceeding with an analysis of the independence strategies that are used.

### **4.2.1 Involvement strategies**

It seems that the Fort Hare Distance materials make efforts to be considerate of and respectful to their readers. As discussed below, they use the receivers' language, claim in-group membership, show an exaggerated interest in the reader, take the readers' wants into account, and use narrative structures, bolding and italics to promote involvement.

#### **4.2.1.1 Using the receivers' language**

A very noticeable feature of the *Whole Language Booklet* is the use of Xhosa (Appendix 1 p114). This operates as an involvement strategy, suggesting that the writers, who are not all Xhosa home language speakers, have made a special effort. Although no conventions of academic or distance course writing suggest that writers should **not** use other languages, in a course and an education system in which English is the *lingua franca*, merging un glossed Xhosa words seamlessly into a text seems suggests a high level of deference on the part of writers.

This impression of deference is increased by the use of and the collection of iintsomi. The writers have taken trouble to find, and find out about, these traditional tales and the sayings they illustrate. The process of collecting an intsomi (p16 –18 and 25) is time-consuming. Writers also emphasise the value of iintsomi by referring to “the rich idioms in isiXhosa” (p16). This respect extends to the people who tell them: they urge readers to “visit some of

the elderly, wise people” (p25). They suggest an exalted association for good story-tellers: “who, like Steve Tshwete, enjoys and knows many stories” (*Ibid*) and are emphatic about the importance of a humble and respectful approach to such people:

After the customary exchange of greetings, ask that person if they know any stories behind your idiom or saying. Just as you were advised in the umthamo, *Learning in the World*, you will have to approach this person in the proper way. You are the one who needs the information. This person may well have the knowledge you need. If you approach them in an appropriate manner, you will be able to collect your data...successfully (p25).

The involvement strategy of using the readers’ language thus embraces the community of Xhosa speakers. By urging readers to adopt a respectful traditional approach to older community members, the writers suggest that they have the same respect for the community and the language. They are also sensitive to issues like the reluctance older rural people might have to being tape-recorded:

Ask your informant (the person who is sharing their knowledge) if they mind if you tape-record the story (or stories) that they tell you. Explain that you are collecting this story to use with your learners for a language lesson” (p25).

When your informant has told her / his story (or stories), it is a good idea to play back the tape-recording for her / him to hear what you have recorded. This is not only polite, it is also the correct thing to do. If we want to involve our communities more in the education of the young, it is *essential* that the people in our communities trust us” (*Ibid.*).

As a final confirmation of their respect for Xhosa, the writers present the full text of the *intsomi* in both Xhosa and English, suggesting an equal status for the languages. This suggests involvement through asserting the equal status of the readers’ language.

#### **4.2.1.2 Claiming in-group membership, or claiming common point of view**

Chapter 2, p41 explored the way in which the use of the pronoun **we** created an identity for the readers by suggesting writers and readers belong to the same group. This also suggests solidarity and involvement. It seems useful to make these additional comments about the contexts for which these assertions of common identities were made.

The first use of **we** unites writers and readers as participants in the Fort Hare course, both teachers and students: “In this umthamo, we are going to look at ways of teaching

language...” (p2). This establishes the friendly intentions of the writers at the beginning of the booklet, and focuses on their common membership of a group embarking on the teaching-learning process. They do not return to this use of **we** in the rest of the text, suggesting the strategy is discarded.

Three other uses of **we** unite writers and reader as South Africans, perhaps South African teachers, possibly Eastern Cape educators, as concerned educators (perhaps also concerned parents, responsible family and community members), and as teachers. For example, “If we want to involve our communities more in the education of the young ...” (p12). This identity is constructed as part of exhortations. It seems that the writers wish readers to share their attitude and are therefore suggesting a common bond and purpose between writers and readers. In fact, the readers are not yet members of the group of concerned South African educators who think this way, but may become so as a result of this course. The writers may be trying to change readers’ allegiance as part of the process of studying this course. It seems that where desirable change (in the writers’ eyes) is at stake the writers make their appeal stronger by asserting common group membership.

Only two group identities suggested by **we** are based on a real sharing of experiences. Firstly, the group of working professionals: “We sometimes have regular times to do certain things. But we don’t have a rigid timetable for the jobs that we do in daily life” (p12). Secondly, as people accustomed to telling stories: “When we tell a story orally, the people who are listening influence the way the story is told” (p22).

Earlier (p59) I mentioned that involvement and independence strategies can be combined in the same phrase and create balance within the smaller unit. An example of this occurs with the use of **we**. In 11 of the 14 uses, **we** is combined with conditionals, disguised conditionals (**when** meaning **if**) or hedging (Appendix 9 p125). In each of these cases, the conditional acts as an independence strategy, balancing the involvement strategy of **we** and producing the balance of strategies suggested by Scollon and Scollon (1995).

#### **4.2.1.3. Showing an exaggerated interest in the reader**

The established conventions of textbook and academic writing dictate disinterested impersonality and detachment (see Chapter 1 p3). In a textbook therefore almost any interest

the writer shows in the reader could be construed as exaggerated. In the *Whole Language Booklet* this passage occurs:

Now think of yourself. You probably have lots of different jobs or roles to play. Maybe you are a mother, a wife, and a housekeeper, as well as a teacher. Maybe you also have certain other jobs that you do in your community. You aren't four or five different people. And often the other 'unofficial' jobs that you do, help you to do your job as a teacher even better (p12).

As part of an analogy about integrated timetables, writers are showing their understanding of readers' lives, especially demands on the time of busy teachers. They could have used another illustration, but chose this vehicle to show their interest, concern and approval. By declaring that "often the other 'unofficial' jobs that you do, help you to do your job as a teacher even better" they seem to withdraw any implication that they are accusing their readers of "moonlighting".

This exemplifies the way in which relevance, or activating schemata, signal writers' interest in readers. Relevance means creating a strong link between material and the students' likely life experiences and is a strong feature of the *Whole Language Booklet*. The passage quoted above makes such a link, as do the Xhosa words and the fact that the readers are asked to research and use the traditional tales of their own communities.

Much of the relevance created by the writers seems to be a result of their professional concern for the readers. Creating relevance is an accepted teaching device, making the link between the material and learners' lives which they might not otherwise be able to make for themselves. Used in this way relevance suggests another kind of concern for the readers, that is their needs as students. As such it overlaps another strategy of involvement: showing that you understand the readers' needs and are taking them into account.

#### **4.2.1.4 Indicating that you know and take the reader's wants into account**

Writers show their awareness of readers' needs in three aspects of the readers' lives: as students, as working professionals, and as teachers in under-resourced schools.

Firstly, the writers seem very aware of readers' needs as students. Kress (1989:26) suggests that features such as simplified lexis and syntax, large print and shorter sentence length

derive from writer's perceptions that their readers have a limited attention span and a limited ability to concentrate on extended texts. In the *Whole Language Booklet* writers lay out the work as clearly as possible. They use bolding, italicising and boxes to subdivide work into smaller units (Appendix 13 p130). Paragraphs are short, as are many sentences. Important words are emphasised with bolding and italics (see p67 also). The font is 24-point Arial. All this suggests that the writers understand their readers' problems and have sympathy for them.

In addition, the clear structure of assignments, reading materials, the bulleted directions, explanations and glossing all signal that the readers need a lot of support to help them find their way through the work. For example, instructions often look ahead and warn the readers of what to expect:

At the face-to-face session **where this umthamo is monitored**, you will have to report on your experiences carrying out part 1 of the **Key Activity**. So you will need to make sure that you have completed Activity 7 *before* that face-to-face session (p3).

At the face-to-face session where this umthamo is monitored, **you will be expected to share this experience with your fellow readers**. Take along some of the stories that your learners write, as well as the beginning of the story that you told. It is a good idea to store some of your learners' stories in your Concertina File. You may want to include some in your Portfolio at the end of the year to show what you have been doing in your classroom with your learners (p29).

Secondly, writers show awareness that readers are working professionals with little time for study:

If you do this during the holiday, it will save time next term (p22).

**This will take a long time.** But sometimes research takes time. Be thorough. Don't forget to include your informant's name, and some biographical details of that person. Remember this is a degree course. Store this in your Concertina File (p26).

Writers seem aware of the difficult situations in which many of these teachers work, the demoralising lack of support from the Education Department, and the calls on their time and energy discussed in Chapter 1 p7.

Thirdly, writers show awareness of the needs of their readers by acknowledging the probable poverty of the readers' school environments. For example, readers are provided with tape-recorders: "At the last face-to-face session, you were given a tape recorder..." (p22). They also recognise that readers may be teaching in under-resourced schools and that some decisions about lessons are financial ones:

You will also have to decide whether you write this story beginning on the chalkboard, or whether you make copies so that your learners can share one copy between two learners. If you have a very big class, this could be quite expensive, especially if your school does not have copying facilities (p27).

#### **4.2.1.5 Narrative structures and passages**

I would like to suggest that the narrative passages referred to in Chapter 3 operate as an involvement strategy in the context of academic writing, which favours detached scientific, rational structures. Narrative passages occur five times in the booklet, covering five and a half pages and recreating a reassuringly oral exchange. Narrative slows down the pace of the insistent imperatives mentioned in Chapter 3, and seems to be used for three purposes: Firstly it provides a relaxed, easily followed introductory explanation for material and activities. Details give the account warmth and a human face. Secondly it is used to explain the principle behind instructions. For example, the idea that finding a version of an intsoni is a joint effort starts: "When Viv was doing some research about using stories in classrooms, she was studying with someone from Tanzania, Anise Waljee. ..." (p22). Thirdly, narrative suggests the process readers should follow. For example, in the account of Tillie collecting intsoni, Tillie is a model for readers, and her successes and failures will apply equally to them. The writers may also be modelling a Journal entry, one of the activities of this booklet:

Since I was not sure of what actually happened, I asked my sister-in-law, Lulu Maholwana, about the story. This is what she told me... Then we thought of Mr Caga, who had been a teacher of isiXhosa, and who is now an inspector of schools. When we asked him about the story, he couldn't remember the story, although his age fits the era when we read the story in our Xhosa readers in the lower primary classes (p16).

Placed as they are, between sections of instructions, and used as they are instead of the more formal scientific explanations, the effect of these narrative passages is to suggest writers' friendliness and goodwill. They emerge as mentors who will provide context and support.

#### 4.2.1.6 Bolding and italics to create “orality”

Bolding and italics are used lavishly in the *Whole Language Booklet*, and few pages do not contain one or the other. The writers have chosen to use italics instead of inverted commas for quotations, Xhosa words or phrases and emphasis. Often italics and bolding are used together, imparting urgency and insistence to instructions, for example:

*Don't **write** down questions as if you are testing your own **reading** (for example, *How many people were traveling? What transport were they using?*). (What were you doing at this stage? You are **thinking** and **writing** in response to what you have **read**)” (p14-15).*

Written text emphasised in this way has the effect of an oral exchange, seeming especially to capture the didactic speech patterns of the primary school teacher, who will enunciate clearly and repeat what is important in the lesson. For example, the theme of the umthamo is integrating reading, thinking, writing, speaking and listening. These concepts are bolded in their first mention (p10), and throughout the book thereafter in thirteen separate paragraphs. This seems to be the written equivalent of the emphatic repetitive chant of the primary school classroom. A reader unfamiliar with its origins might find it patronising, but to these readers, primary school teachers themselves, it may have the benefit of familiarity. In that case it seems to be an expression of the writers' desire to enter their readers' world and express solidarity with them.

Other single words are bolded or italicised or both. The following examples, selected from only two pages, show how lavishly this device is used in the rest of the book:

The ideas and activities in this umthamo combine a **whole language** approach with a **literature-based** approach to language teaching and learning (p2).

At the face-to-face session **where this umthamo is introduced**, you will experience a “whole language” approach yourself (p2).

For the **Key Activity** in this umthamo, we are going to ask you to try out a “whole language” approach with your class (p3).

At the face-to-face session **where this umthamo is monitored**, you will have to report on your experiences carrying out Part 1 of the **Key Activity**. So you will need to make sure that you have completed Activity 7 *before* that face-face session. (p3).

I believe that bolding and italics used in this way contributes to involvement by inserting the writers very directly into the text, and creating a classroom experience through print. They are a constant presence as one reads, urging readers to notice and remember essential words and concepts. It imparts some of the rhythm of spoken language and communicates writers' urgency and insistence, for example:

Then, ***together***, they were able to piece together and remember the stories they had heard when they were young (p22).

The most important thing that we can say is that you ***only need the beginning*** of the story (p26).

Tell them to work in pairs, and **write** down ***very quickly*** all the questions they can think of... (p27).

We will ask you to think about, and write down, what is the ***same***, and what is ***different*** (p32).

The writers' use of so many pointers to what is important suggests an identity for the readers as students who need a lot of guidance and may struggle with texts however simply they are written. The writers seem to envisage the difficulties readers may have, and use this as an involvement strategy in an attempt to encourage struggling readers.

#### 4.2.1.7 Reciprocity

Cook (1989:60) remarks that

Discourse is reciprocal if there is at least a potential for interaction, when the sender can monitor reception and adjust to it – or, to put it another way, where the receiver can influence the development of what is said. ... If we assign positions to particular instances of discourse we find firstly that there are many intermediate cases, and secondly that absolutely non-reciprocal discourse is unlikely. Even writers working in solitude try to form some idea of the receiver of their work and adjust to it - the meaningfulness of what they say can be viewed as a measure of the success of that prediction and adjustment.

A textbook would be on the non-reciprocal end of the continuum, as interactional control is all in the hands of the writers. In the *Whole Language Booklet* there is a degree more responsiveness available to the writers, as they have the option of revising and adjusting material, as mentioned in Chapter 1 (p2). Reciprocity is also created when writers suggest that the readers should share their own interest and knowledge of traditional tales:

Do you know any other or different versions of this story? If you do, please write out the version you know. You can write in isiXhosa or English (or even both!). We would really like to collect some other versions” (p21).

This seems to elevate the status of the readers temporarily to that of the writers at the same time as drawing them closer as colleagues and co-researchers, inviting them to respond as equals. Although it is the only example of reciprocity in the *Whole Language Booklet* it is a powerful one. Its obvious sincerity and its informal emphasis (We would **really** like to...) give it impact. Also, as reciprocity is an unusual feature of textbooks, this effort made by the writers increases its significance.

#### **4.2.2 Independence strategies**

Having examined the involvement strategies used by the writers of the *Whole Language Booklet*, I turn to independence strategies to assess the balance between them. Before that, however, I look first at three independence strategies not used at all by the writers of the *Whole Language Booklet*.

##### **4.2.2.1 Independence strategies not used:**

**Dissociate speaker and hearer from the discourse:** The persistent use of **we** and **you** (see pp25 & 41) makes both writers and readers very present in the text. When added to the anecdotal interludes, conversational openings and narrative structures, the effect is to pull writers and readers into the text, not to dissociate them from it.

**State a general rule:** The writers seem to avoid the formal, scientific, disengaged, factual conventions into which “stating a general rule” would fit. The only examples are discussed in Chapter 3 as part of writers’ construction of their own identities.

**Give the reader the option not to do something:** Directions for activities and assignments are given positively and firmly, using strings of imperatives which preclude choice. Choices in activities are between two clearly worked out alternatives, and are not true options for the reader not to do something, as discussed on p50.

#### 4.2.2.2 Independence and involvement: The use of family names and titles

The writers of the *Whole Language Booklet* use a number of alternative naming conventions. The exclusive use of first names would suggest an egalitarian attitude to readers and subjects; the exclusive use of surnames would suggest greater distance and formality. In the *Whole Language Booklet*, the writers use both, suggesting a hierarchy of status expressed through naming conventions. It is not a hierarchy which reflects the **social** status of the subject, however, as former Minister for Sport the late Steve Tshwete, author Hugh Hawes and sister-in-law Lulu Maholwana receive the same naming conventions. The real people named in the *Whole Language Booklet* are:

- Tillie – co-author
- Alan – co-author
- John Barlett – colleague (?) unidentified.
- Hugh Hawes – academic, named in connection with a book he has written and a conference he attended.
- Lulu Maholwana -Tillie’s sister-in-law
- Mr Caga – inspector of schools
- Miss Kolisa Ngodwane – retired Maths and Science teacher (referred to afterwards as Kolisa)
- Mr Hintsia Siwisa – attorney (referred to afterwards as Mr Siwisa)
- Minister of Sport, Steve Tshwete (referred to afterwards as Steve Tshwete)
- Viv – co-author
- Anise Waljee – fellow researcher (with Viv)
- Margaret Spencer (Emeritus Professor, University of London)

Of the twelve, the three who are named by their full name and title are those who are least intimately involved with the writers of the book, and whose names are not in the public domain like those of the late Steve Tshwete and Margaret Spencer. They are not friends, relatives, current colleagues, or co-researchers, and the writers recognise this with a more respectful, formal appellation. Nevertheless, with the exception of Mr Caga, their first names are mentioned at least once. In the case of Miss Kolisa Ngodwane, the surname and title are dropped, but in the case of Mr Hintsia Siwisa they are retained. The hierarchy seems therefore to be a hierarchy of involvement with the course. It also seems possible that increased formality reflects the extent to which the writers feel they have imposed on the time of these people. It may also reflect the actual relationship they established when they met: warmer and more intimate for Kolisa, cooler and more formal for Mr Siwisa.

Adding surname and title seems against the writers' preference for first names and the egalitarianism it implies. This may exemplify a thesis of Scollon and Scollon's (1995:104) regarding utilitarianism, briefly outlined in Chapter 1 (p9). One of the manifestations of this philosophy in discourse is egalitarianism, so that even if individuals have unequal positions in their organisation or society, the implied reader and writer are assumed to be equals. However, Scollon and Scollon (*Ibid.*) also suggest that the principles of equality, individuality, and freedom of expression only apply to members of this discourse system, who are assumed to be enlightened, progressive, and developed. Non-members are assumed to lack these qualities. Therefore the discourse system, "while advocating equal rights for all members, quite specifically denies those rights of equality to those who do not show themselves willing to participate in the ideology of this discourse system" (Scollon and Scollon 1995:116). In the naming conventions recounted above, it is outsiders to the education system, a lawyer and a Minister of Sport, who are excluded from the first-name-only egalitarianism extended to others, suggesting that there may be a strand of utilitarian thinking in writers' presentation of these "guests."

#### 4.2.2.3 Independence strategies

Independence strategies are used to balance involvement strategies and hold them in tension, so that their effect is not invasive or patronising. It is the **combination** of the two that create the effect we call "politeness." However it can be difficult to assess whether the combination of involvement and independence strategies is ultimately appropriate and whether writers have successfully negotiated the balance. Of the independence strategies available to them, the writers of the *Whole Language Booklet* use only **apologise** and **minimise threat**, so it appears that they make greater efforts on the side of involvement. They may be trying to project a nurturing concern, and after meeting them at face-to-face sessions and establishing real social contact the readers might understand this to be case. One can ask also whether the effect really is warm and caring: the strings of questions, the imperatives, bolding and the lack of choice might appear bossy and invasive to some. This reaction will be different from reader to reader, and each will assess the appropriacy of the strategies chosen against their own norms and life experiences. As suggested on p56 the negotiation of politeness in an environment of shifting personal and cultural expectations can be complex. It does however need to be recognised that writers' intentions may not be successfully conceived linguistically and that a caring intention may have an alienating effect.

To balance the involvement strategies, the writers of the *Whole Language Booklet* use the following independence strategies:

#### 4.2.2.2.1 Apologise

Apology would be an unusual feature in any textbook, but the *Whole Language Booklet* does have slightly apologetic moments, when writers seem to acknowledge that their demands might be excessive. This emerges in the emphasis of these examples:

... we are going to ask you to think of *another* saying or idiom, and we are going to ask you to collect *more* intsoni (p25).

In other words, listen to the tape, bit by bit, and write down in your Journal every bit of the story that your informant told you. **This will take a long time.** But sometimes doing research takes time (p26).

The significance of these two examples should not be underestimated. It shows that the writers are aware of the drain that these activities put on the time of the readers, and have an understanding of their problems as studying professionals.

#### 4.3.3.2.2 Minimise threat

Hyland (2000:15) suggests

... knowledge claims, criticisms and denials of claims constitute Face Threatening Acts, both against readers engaged in the same research area and a wider disciplinary audience, and that we can reconstruct the reasoning behind linguistic choices such as hedges and solidarity pronouns as strategies to mitigate threats to face.

If claims of knowledge and academic authority can be seen as threatening acts by readers, then writers of the *Whole Language Booklet* appear to minimise threat. As discussed in Chapter 3 (p54) they seem reluctant to promote themselves as academics and experts. In addition, they appear to minimise threat by reducing three other features which might be experienced as threatening by their readers: ambiguity, choice and academic jargon.

Ambiguity of any kind might be experienced as alarming. To minimise threat in this regard the writers seem to have focused on being clear, accurate and precise. There is no vagueness

about what readers are expected to do in classroom practice or research procedure. This example was framed and bulleted for greater clarity:

Ask your informant (the person who is sharing their knowledge) if they mind if you tape-record the story (or stories) that they tell you. Explain that you are collecting this story to use with your learners for a language lesson (p25).

A second feature of a distance course which might constitute a threat to readers is too much choice. This seems to contradict earlier (p50) criticisms I made about the lack of choice, but it is possible for the same feature to operate in different and opposing ways. Kress (1989:29) remarks that “a genre is not characterized by one or two or half a dozen particular linguistic features operating in a text, but by the totality of the linguistic forms selected in the production of a text. ... linguistic features can serve different functions at one and the same time.” This can therefore be seen as an ongoing process of negotiating a relationship, balancing strategies of involvement and independence with other language items which may give opposing messages.

Thirdly, a reader of distance materials may experience academic vocabulary or jargon, or the use of formal academic conventions as a threat. These would make material and instructions more difficult to understand and affect readers’ academic success. The writers of the *Whole Language Booklet* have been very careful to avoid some academic conventions (Chapter 3 p51) and have glossed or explained technical words. Also, they have used reassuring narrative structures. These features establish the writers as practical, approachable people who make an effort to create an accessible course.

### **4.3 Conclusion**

It seems that the Fort Hare Distance materials make considerable efforts on the side of involvement. These involvement strategies suggest a relationship between writers and readers which has three aspects. Firstly there is a relationship based on egalitarian respect and affirmation of the readers. Xhosa and Xhosa resources are used to establish this relationship. Using Xhosa is a signal of acceptance and cultural affirmation and swings the power balance towards the readers who may know more such tales than the writers do. The writers make their deference more explicit by asking for help with their collection, creating a momentary identity for readers as esteemed co-professionals.

Secondly, writers seem to create a mentor-novice relationship, asserting the cooperative rather than the coercive nature of their interaction. The writers' use of pronouns to create in-group membership suggests that readers' identity is not quite that of co-professionals, but of novices or professionals-in-training. Readers may become colleagues by going through the course and adopting its values.

Thirdly, there is a relationship based on the writers' concern for their students. The oral-like narrative structures suggest writers are using prose which will not alienate readers. Even in non-narrative instructions the writers continue to insert the rhythm of spoken communication through bolding and italics. Writers also show interest in the readers and communicate that they know readers' needs and are taking them into account. This creates an identity for readers as inexperienced, unsophisticated learners who at this stage in the course need guidance and support. It also suggests that the writers are concerned course-providers, aware of the difficulties their readers may experience. They relate sympathetically to readers' needs and try to meet these needs encouragingly in the text.

The writers of the *Whole Language Booklet* use few independence strategies and seem to emphasise the involvement aspect of their relationship with their readers. Conventional interpretations suggest that the less powerful in an exchange make greater efforts towards involvement, giving the writers this subordinate role. But this need not be the case. Kress (1989:53) suggests that "In Anglo-Saxon middle-class social groups ... there is a 'politeness' convention which suggests that the powerful should not normally openly assert their power." Two of the writers belong to the Anglo-Saxon middle-class group mentioned and may be applying its norms to this situation.

There may be additional contextual reasons why writers disguise their power, which is power endorsed by convention, custom and probably also by their readers. As suggested (p33), these distance learners are (partly) qualified adults, women of influence in their schools and possibly leaders in their communities. Politeness acknowledges this status. Also, the regular face-to-face sessions suggests that a more intimate social relationship is appropriate. The writers may also feel the need to be conciliating for two other reasons:

Firstly, as discussed in Chapter 1, implementing OBE has entailed radical and stressful changes for many South African teachers. Already demoralised by redeployment, large classes and persistently under-resourced schools, many are resistant to the additional efforts needed to implement this new approach. Writers may feel that tact is needed in order not to increase this resistance. Encouraging comments such as “If we want to see change in education, new ideas need a chance to become part and parcel of the regular work in classrooms” (p32) can be understood in this light. The writers’ purpose is to change education in South Africa, not to assist a qualifications paper-chase, but they do not want to alienate their readers by appearing to preach or scold.

The apartheid legacy of distrust between teachers and department officials may be another reason behind writers’ desire to mask their power. Perceptions grew up that department representatives were corrupt puppets of the apartheid government who did not understand the problems of schools. This was particularly the case in the previous Ciskei and Transkei, areas from which this course now draws its students. The writers would not want to be associated with authoritarian policy makers and the egalitarianism of the coursework books separates writers from such officials.

In the *Whole Language Booklet* the power (that is the knowledge, the expertise, the interactional control as well as the ultimate sanction of passing or failing) is all in the hands of the writers, and neither they nor the readers would dispute it. Scollon & Scollon (1995:86) point out that “An asymmetrical (hierarchical) politeness system will show a rather complex set of possibilities. The person in the higher social position would use involvement strategies of politeness.” The positive, assertive use of imperatives, questions, and few modals as discussed in Chapter 3 show that this may indeed be the case. The writers have control of the social occasion, of the genre of the text, even to the extent of experimenting with the usual forms of academic textbook writing, and this is a sign of their power. Although the relationship created between writer and reader is warm and more caring, it is not the relationship of equals. This in turn suggests that for all the efforts they make to affirm and acknowledge the readers, the writers see them as needy: needing support, affirmation, encouragement.

## Chapter Five: Visual elements

The *Whole Language Booklet* was developed by writers who took and selected photographs and made design decisions. This study would not be complete without reference to some of the visual design elements of the text in question, given the same authorship behind verbal and non-verbal elements.

### 5.1 Introduction

In this chapter I begin by explaining advantages of the analytical categories I have chosen. I then apply those categories to the visual communication used in the *Whole Language Booklet*. I look first at the effects of layout, then at the two kinds of photographs used in the text and finally at a woodcut. I refer to the designers, photographers and lecturers as **writers** and to the viewers, students and learner-teachers as **readers**, but recognise that a number of processes are taking place in the creation and reception of the verbal-visual text.

#### 5.1.2 Readers' context and interpreting visual text

In Chapter 1, I suggested common life experience for the readers of the *Whole Language Booklet*. These life experiences will also have influenced their interpretation of visual texts. In particular these readers may be unaccustomed to the kinds of visual text produced in the mass media. As the generation educated by the Department of Education and Training and its predecessor during the years of Apartheid, they were unlikely to be exposed to film criticism at school or to have had much training in visual communication, such as reading graphs or analysing advertisements. They are also unlikely to have attended schools where Fine Art and interpretation of visual design elements was taught as a practical subject in the primary school or as a theoretical subject in the high school. They may come from areas which do or did not have electricity and have been cut off from the disseminating influence of television. They may be unaccustomed to multimodal texts designed to be read as a verbal-visual whole. In this regard, Kress and van Leeuwen (1996:15) observe that “the skill of producing texts of this kind, however important their role in contemporary society, is not taught in schools. In terms of this new visual literacy, education produces illiterates.”

All visual elements and their interpretation are culturally specific. However, the new literacies of multimodality available in South Africa commonly use Western (as opposed to Eastern) principles of design and aesthetics. Kress and van Leeuwen (1996:4) assert that: “The unity of Western design ... derives from the global power of the Western mass media and culture industries, and their technologies.” At the same time there is also the homogenising effect of the mass media where readers have access to them. With the rapid electrification of rural areas and other social changes access is increasing rapidly. Against this background there is always the question of whether readers will have interpreted visuals as the writers intended and as I have analysed them, more so than with regard to verbal significance, which has less diffuse possibilities for interpretation.

### 5.1.3 Analysing visual text

I have used the categories of Kress and van Leeuwen (1996) to analyse the visual features of the *Whole Language Booklet*. I believe their categories offer four advantages to this study. Firstly, they have attempted to find a grammatical language which can be applied to images and texts which merge in a linguistic-visual whole. Kress and van Leeuwen (1996:183) express it like this:

We seek to break down the disciplinary boundaries between the study of language and the study of images, and we seek, as much as possible, to use compatible language, and contemporary terminology in speaking about both, for in actual communication the two and indeed many others come together to form integrated texts.

Because of unity in authorship, the messages of text and visual in the *Whole Language Booklet* are not separate, and Kress and van Leeuwen’s categories address both.

Secondly, they use terms familiar from Critical Discourse Analysis and functional linguistics to identify similar functions in images, for example **modality**, and **process**. As I examine verbal using categories drawn from functional linguistics, Kress and van Leeuwen’s taxonomy becomes uniquely suitable for critiquing visual texts. I believe it creates a smooth flow of meaning and analysis from verbal to visual.

Thirdly, Kress and van Leeuwen suggest that verbal and visual signifiers can be used for similar communicative purposes, and that texts show a continuous interplay of purpose and meaning between the written and visual text. They provide ways in which to discuss this.

Fourthly, Kress and van Leeuwen are located within the same paradigm as critical linguists: that of social constructionism. In agreement with the critical linguists whose methodology has been used in earlier chapters, they maintain that the purpose of visual images is to create and maintain or to contest power relationships in society. In this regard, Kress and van Leeuwen (1996:4) assert that:

Communication requires that participants make their messages maximally understandable in a particular context. ... On the other hand, communication takes place in social structures which are inevitably marked by power differences, and this affects how each participant understands the notion of 'maximal understanding.' Participants in positions of power can force other participants into greater efforts of interpretation.

For these reasons I have based the analysis of the visual elements of the *Whole Language Booklet* on the categories and insights they provide.

## **5.2 The analysis**

I use the term “visual” to refer to all non-written modes of communication: pictures, photographs, cartoons, graphs, maps and paintings. In the section of the *Whole Language Booklet* which is the subject of this analysis, there are just three of these which I shall analyse in this order:

- layout (including icons, bolding, headings and text boxes),
- fifteen photographs of people and
- one lino-or wood-cut.

The whole booklet further includes photographs in colour on the front and back covers, a drawn timetable on pp 4-5 and illustrations (pen and ink drawings) in the Appendix.

### **5.2.1 Layout**

I have already commented on the way layout contributes to making the text clear and accessible (p65). Layout has an “invisible” quality but contributes significantly to the

message of the book as a whole. Kress and van Leeuwen (1996:15) observe that “many kinds of books today involve a complex interplay of written text, images and other graphic elements, and what is more, these elements combine together into *visual* designs, by means of layout.”

The *Whole Language Booklet* is printed in Arial 14 point, which gives it a clear, open “modern” look. This font is reminiscent of the print taught and used in primary schools and may therefore be reassuring to the readers. A feature which they might find less reassuring is that many pages are solid text unrelieved by pictures or ornamentation. Other layout features include:

- Icons in the left margin
- Glossary and explanatory text boxes in the right margin
- Emphatic texting: bolding and italics
- Headings of units and sections are in Bold 18 point
- Sections of text are framed
- Bulleted points
- Paragraphs are mostly small – four or five sentences (10 lines) or fewer
- Grey background in some text.

Although icons appear on most pages, photographs and other visuals appear less often: on 7 of the 22 pages of the selected text (Appendix 13 p130 for a sample page). Some pages contain nothing more than boxed and bulleted information. In the account below I will discuss the effect of reading path, bolding and italics, text boxes, icons and right hand margin text boxes.

### **5.2.1.1 Reading path**

Layout imposes a hierarchy for each page which is itself a communication. Kress and van Leeuwen (1996:185) suggest pages are arranged as a “single semiotic unit, structured, not linguistically, but by principles of visual composition. ... reading is not necessarily linear, wholly or in part, but may go from centre to margin, or in circular fashion, or vertically, etc.” The layout of each page presents a reading path to the eye, created by elements which draw the eye to create a succession of focal points.

In the *Whole Language Booklet* the reading path is linear and vertical, in spite of double-page units. Kress and van Leeuwen (1996:218) suggest that “In densely printed pages of text, reading is linear and strictly coded. Such texts must be read the way they are designed to be read – from left to right and from top to bottom, line by line.” This is the most conservative reading path available to designers and writers, and dominates conventional Westernised literacy. This reading path suggests a hierarchy (or sets of hierarchies), from the general heading to the specific and detailed, as is the case in the *Whole Language Booklet*. As the unit is a double page, the movement from general to specific travels over two pages instead of one.

However, within this dominant style, the *Whole Language Booklet* offers a secondary reading path. Each page is divided into a broad central column of print with two fairly wide margins and some text appears in right hand margin text-boxes. Other text has been bolded or boxed for emphasis. As the eye is drawn to elements with “salience” or an eye-catching quality, the reader will start at the point of greatest salience and move to the next. It is therefore possible that readers may be led out of the vertical reading path on some pages to ‘jump’ into margins.

The dense linear text of the *Whole Language Booklet* places it in the most conservative tradition of text-book writing in spite of the modern open look of the 14-point Arial font. Western media have a long established tradition of the top-down left-right path of the eye across a page and many visuals combine horizontal and vertical structuring. For the *Whole Language Booklet* conservative choices may be the safest route to take with readers who may be unsophisticated viewers and do not have many opportunities for clearing up misunderstandings.

### **5.2.1.2 Headings, bolding and italics**

The effect of bolding and italics is discussed in Chapter 4, pages 66-67. Their purpose is overwhelmingly organisational rather than aesthetic. The bolded larger headings, framed texts and bullets seem an attempt to make sections clear and to divide them sharply from each other. With icons as the only potential decoration, the effect is businesslike and sparse, suggesting the bare essentials of the course. They will also promote easy study and reading. Other elements which help reading are the broad margins, which mean that small,

manageable amounts of material are placed on each page. Paragraphs are seldom more than ten lines long. This avoids intimidating a working distance student.

A second purpose of these layout features is to give clear signals about the importance of different sections of the work. I commented in chapter 3 about the didactic tone bolding and italics gives to the text. Visually they have been used to emphasise important ideas or instructions, as in this example: “Get into a small group of four, and **share** the questions that you have **thought** of and **written** down” (p15)

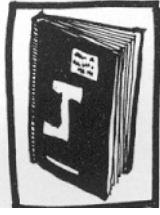
Kress and van Leeuwen (1996:219) maintain that “the more a text makes use of subheadings, emphatic devices (italics, bold type, underlining) ... the more likely it is to be scanned, skip read, ‘used’ rather than read: linear reading is slowly losing ground.” It seems unlikely that the writers intended anything to be left out, but this intention may not be the effect achieved. These elements seem designed to draw readers’ attention but **not** at the expense of anything else.

### 5.2.1.3 Text boxes

The text box is a layout device used to communicate a hierarchy of importance, and in the *Whole Language Booklet* they are used to delineate all activities. Kress and van Leeuwen (1996:52 & 53) refer to the work of Dondis, Thompson and Davenport who suggest that the square box shape signifies “honesty, straightness and workmanlike meaning,” order and technological positvety. Boxes in the *Whole Language Booklet* seem to suggest a practical, functional approach to the presentation of the material. Kress and van Leeuwen (1996:214) also declare that “The stronger the framing of an element, the more it is presented as a separate unit of information.” These boxes divide the teaching material and assignment instructions, and the writers seem to be ensuring that readers will realise which sections represent work they must do.

### 5.2.1.4 Icons

The icons are explained to readers on the back page of the booklet (Appendix 14 p131) and are roughly drawn suggestions of the activity together with the first letter of that activity, for example a “**J**” on the book to signify **Journal**.



The robust nature of the drawing and lettering suggest their purpose is organisational. Usually the activity is identified in the text alongside it, so for example the Journal icon is used and the first sentence is “Take out your Journal, write the date and time” (p12). Kress and van Leeuwen (1996:23) note that when “language comes first, authoritatively imposing meaning on the image,” the writer is narrowing options for interpretation until the image can only mean one thing. The icons in the *Whole Language Booklet* have their meaning narrowed twice, once at the back of the book and once in the text accompanying each icon. The icons are closed and authoritative symbols to propel the reader in one direction only.

#### **5.2.1.5 Right hand margin text boxes**

There are eight boxed commentaries on the central text, each with a different function (Appendix 15 p132). They expand, explain, suggest options, illustrate, provide a hint, give an additional instruction and refer to a previous umthamo. From this variety of functions it seems that the exact purpose of these boxes may not have been clearly worked out. In some cases the information is as peripheral as the text box, like the information about Hugh Hawes. In others it seems more important and it is difficult to see why they have been placed where a reader might miss them where they have been placed, out of the vertical reading path.

#### **5.2.1.6 Summary**

These layout features suggest writers’ primary concern is to give clear, strong guidance to their readers. The layout is conservative and directive with organisational features dominating the design principles. Layout gives clear signals on the relative importance of sections and ideas. The layout choices suggest a didactic authoritative relationship in which the writer is very much in charge in a conservative teaching context. It seems writers fear the readers might lose their way through the material or the concepts being taught them.

## 5.2.2 Photographs

### 5.2.2.1 Photographs and visual communication

Photographs have a special place in the language of visual communication, and raise a number of issues. First there is the issue of what the writer is communicating by choosing photographs rather than drawings or sketches. If the photograph is of a person there are additional interpersonal elements communicated by the subject's expression, posture and size. This means the subject may stand in for the writer and combine with written text to establish a certain kind of relationship. Secondly, the photograph is the visual most likely to be accepted by the reader as an open and "true" representation of reality, a recording unlimited by social control. They are therefore used by writers who want to establish the truthfulness of what they are communicating. In fact there are many ways of manipulating photographs to affect their meaning, so any impression of neutrality is a relative one. Thirdly, when the photograph depicts a human subject, the reader inevitably becomes drawn into the message the subject seems to be communicating non-verbally. This means that photographs can create a **social** relationship, with its concomitant power differences. Finally if a photograph is accompanied by written text there is also the issue of whether language used as a translation medium for the visual, and if so, whether language and visual communicate the same thing.

### 5.2.2.2 Photographs in the *Whole Language Booklet*

The photographs in the *Whole Language Booklet* fall into two groups. These groups are so similar to each other that it is possible to generalise about them. They are:

- Contributors to the story of the intsoni (pages 17 and 18).
- Children working in groups in classrooms (pages 13, 36 and 37).

### 5.2.3 Photographs of contributors to the story

On pages 16, 17 and 18 Tillie, tells how she collected the story behind an intsoni. In the process she consults five people to get their versions of the story and to make sure her version is complete and correct. Each person she consults is pictured surrounded by the text of Tillie's



narrative of the search. The photographs are black and white, about the size of an Identity Document photo and placed in a square line frame, for example:

### 5.2.3.1 Relating the visual to the text

These photographs are not captioned and writers seem to assume that readers will connect them to people mentioned in the narrative. This is assumed **as though** they are people the readers know. This would be true of Tillie, who readers meet at face-to-face sessions. Some may also know Mr Cage, inspector of schools, Mr Swiss, attorney, and the late Steve Tshwete, former Minister of Sport.

### 5.2.3.2 Visual processes

Kress and van Leeuwen (1996:81) suggest that photographs can reveal processes, using **process** in the Functional Linguistics sense of **action** or **state**. The photographs of contributors suggest **classification**, **analytical** and **existential** processes. In the account which follows I examine them in that order.

Images shown in a decontextualised way suggest a **classification process**, and four of the photographs of contributors show no background while in two others it is indistinct. A lack of background emphasizes the timeless, stable nature of the classification and relates subjects to each other rather than their context. Their membership of the same category, in this case as contributors to the *intsomi*, is also realised visually through symmetrical composition. The photographs of contributors are all head and shoulders portraits, background is neutral or absent, there is no depth, and the angle in four of the six is objective, that is, the subject is facing the camera. The sixth photograph, of Steve Tshwete, shows him addressing a group, and seems to have been taken by a press photographer (the Daily Dispatch is thanked for permission to use this photograph). All the photographs are the same size and are all surrounded by a line frame.

The visual equality established in this way suggests equal status for the subjects, so a writer and a retired primary school teacher belong to the same category as an inspector, an attorney and a cabinet minister. They are drawn together by the writers' search for the "true" version of the *intsomi*.

These photographs also suggest an **analytical process**, which relates subjects to each other in a part-to-whole structure. Kress and van Leeuwen (1996:89) suggest that posed photographs are analytical as they allow readers to scrutinise subjects and their attributes. These photographs show only part of the person, allowing readers to focus on important features, which in this case are their eyes and mouth, which communicate personality and mood. As the subjects appear friendly and relaxed, their common attribute is their friendly, willing manner. Four look out at the viewer in a friendly, interested way while two are communicating pleasantly with an undisclosed third person. Their friendliness is important to establish, as readers must approach people in their community, some perhaps as intimidating in their own way as former Minister Steve Tshwete.

The third process which these photographs suggest is an **existential process**. Kress and van Leeuwen (1996:114) suggest that existential pictures “simply state that ‘something exists’ or ‘something happens.’ They have only one participant, whose existence the structure affirms.” These photographs prove that the subjects are real people who were really consulted. By allowing their photographs to be included the subjects endorse the process of collecting the intsoni. They proclaim the authority of the writers: this is something that really happened and the photographs are evidence of it. They underline the validity of the search and the veracity of the writers.

### **5.2.3.3 Visually creating a relationship**

The second potential of photographs is to create a relationship with the reader. Kress and van Leeuwen (1996:121) point out that photographs and pictures “serve different communicative functions: the photos (especially the close-up) seek above all to bring about an imaginary relation between the represented [subject] and the [readers].” Features of a photograph which may create a relationship are dealt with briefly below.

#### **5.2.3.3.1. The gaze of the subject**

The element of a photograph which above all creates a relationship is the gaze, which Kress and van Leeuwen (1996:122) suggest has two related functions:

In the first place it creates a visual form of direct address. It acknowledges the viewers explicitly, addressing them with a visual ‘you.’ In the second place it constitutes an ‘image act.’ The producer uses the image to *do* something to the viewer. It is for this reason that we have called this kind of image a ‘demand’: the participants gaze... demands that the viewer enter into some kind of imaginary relation with him or her

The kind of relationship will depend on the expression of the subject, but one who can demand a response will also have the social power to do so. In the *Whole Language Booklet*, the photographs of the contributors do indeed have the effect of “a visual ‘you,’” and the informality **you** suggests. Their friendly smiling gazes welcome readers as co-participants in the research process, and invite them to start their project with confidence. Moreover, these photographs are set in a text which is the most informal in the booklet. Tillie’s first person narrative is full of contractions (I’m, don’t) and deprecating admissions of forgetfulness and uncertainty. It has a conversational quality, and contributors are mostly referred to by first names (see p39). So the “visual you” has a verbal counterpart in the language accompanying it.

The second claim Kress and van Leeuwen make about such photographs is that they constitute an **act**: they do something to the viewer, and that act creates a relationship of some kind. In the case of these six contributors the act is to reassure and communicate truthfulness and honesty: these are real, ordinary people and they have all contributed to the intsoni. They are the human faces writers have put on the task.

#### **5.2.3.3.2 The size of the frame**

The size of the frame and whether the shot is a close-up, medium or long shot communicates social distance. Kress and van Leeuwen (1996:130) suggest that “Just as in everyday interaction, social relationships determine the literal and figurative distance we keep from each other, so the representation of a person in a picture as a close-up suggests an intimate, close relationship of the kind we might have if that person were really present.” The photographs of the contributors, although small in themselves, show the head and shoulders of the subjects in a way that focuses on their expression and does in fact suggest a close relationship. It suggests people whose emotions and words should be important to us. It is appropriate that the attorney and minister are glancing aside, and that more of the minister’s

body is shown: he is an important man and a greater distance in the relationship is suitable. The social closeness of the visual elements once again matches the language of the surrounding text: colloquialism and first names.

#### **5.2.3.3.3. Perspective**

Perspective suggests subjectivity: the “point of view” of the photographer. It therefore also suggests writers’ relationship with the readers or an attitude towards the subjects. Naturalistic perspective, like the head-and-shoulders shots of the contributors, suggests objectivity and “truthfulness.” The exception is that of Minister Steve Tshwete, whose body is slightly angled across the frame, and whose head is placed at the meeting of two vectors (of a roof or awning), emphasising him and his importance.

#### **5.2.3.3.4. Camera angle and height**

Camera height to express power or powerlessness visually is a common device in film photography. Contributors to the intsoni are viewed from the same level as the photographer and are therefore depicted as equals. Again the exception is Steve Tshwete, who seems to be on a podium, creating the visual message that he is more exalted than the other contributors.

#### **5.2.3.3.5. Modality**

In language, modality expresses politeness, obligation, and other relational functions (see 3.2.4 page 45). **Visual** modality however focuses on visual signs which suggest transparency, truthfulness and plausibility. It means representing things as though they are real, or as though they are not. Clearly photographs hold a special place in the options available to writers who wish to communicate truthfulness. Kress and van Leeuwen (1996:168) suggest that

A certain standard of photographic naturalism ... has become the yardstick for what is perceived as “real” in images, even when these images are not photographs. Underpinning this is the belief in the objectivity of photographic vision, a belief in photography as capable of capturing reality as it is, unadulterated by human interpretation.

The use of photographs in itself suggests a concern with this kind of modality. The representation does not have to be true in an ultimate sense: it is a culturally constructed and

culturally approved notion of what constitutes the “truth.” The following comments are made while recognising that financial considerations probably dictated many of the decisions made about photographs in the *Whole Language Booklet*. Kress and van Leeuwen (1996:163) suggest four criteria for judging visual modality in photographs:

- **Naturalistic colour.** These photographs have low modality, as they are in black and white with little or no background detail. On the other hand they resemble ID document and newspaper photographs which have the high modality of “truthful reporting.”
- **Background detail.** The more context and setting, the higher the modality, and these show none or little.
- **Levels of abstraction.** The least abstraction suggests the highest modality and these photographs are not abstracted in any way.
- **Naturalistic depth, brightness and illumination.** The absence of background makes naturalistic effects of depth and lighting impossible; they may well have been taken with a flash.

Given what has been said earlier about the effect of truthfulness created by the photographs of contributors, one would expect these photographs to express high modality, but this is not the case. However these photographs resemble Identity Document and newspaper photographs, both ways of depicting reality familiar to these readers, and commonly associated with truthful representation. The uses of these types of photograph – as identification and in support of news - might communicate a greater apparent truthfulness to the readers of the *Whole Language Booklet* than a large colour photograph would. It may also suggest to them that writers have the authority of bureaucracy and official print media.

#### **5.2.3.3.6 Composition and salience**

Composition and salience merge in these portraits, as subjects are placed in the focal centre. **Salience** refers to what is noticeable in a photograph, what catches the eye. Kress and van Leeuwen (1996:181) remark that “Pictorial elements can receive stronger or weaker ‘stress’ than the other elements in their immediate vicinity, and so become more or less important ‘items of information’ in the whole.” The salient features of these photographs are those which draw our attention in any face: the mouth and eyes, and their cheerful, welcoming expressions have been noted before. Interestingly, Steve Tshwete’s eyes are masked by dark glasses and the most salient feature is his hands which are gesturing expressively to his audience. The photograph shows him communicating, and thus more in the role of story-

teller than the other subjects. It is **his** version of the intsoni that is eventually included in the booklet.

#### **5.2.3.3.7 Summary**

The effect of the photographs of contributors is twofold: firstly to embed the account of collecting the intsoni in reality and secondly to suggest that collecting intsoni is a process in which people are delighted to be involved. Through this the writers seem as encouraging and reassuring as the subjects, but they seem also to view the readers as people who need a great deal of encouragement to complete this assignment. Perhaps experience with other groups has taught them that readers find this task particularly intimidating, or are prone to give up on it. This suggests a relationship with the readers that is not the relationship of equals suggested on some levels by the photographs. It seems in fact that throughout the work there is a powerful opposing dynamic at work, with writers' desire to be egalitarian towards fellow professionals balancing their need to be clear and directive. The analysis in Chapters 2 and 3 shows a similar balance being negotiated in the verbal text.

#### **5.2.4 Photographs of children working in groups**

On pages 13, 36 and 37 there are seven photographs of children working together in groups in classrooms (Appendix 17 p134). None show a teacher teaching. Although there is a greater range of compositional features than the photographs of contributors, they are strikingly alike in mood, content and presentation. All show children (sometimes the same children) focused on a task. They seem to be taken at the same stage in a lesson, when the learners are left in groups, usually seated, to complete a task. Each shows learners' intense engagement with the work they have been given. All except one are interior medium to medium-long shots taken in classroom or school settings. Often the posture and hand gestures of the subjects are similar. Each photograph is captioned (see below). In the account which follows I re-use the analytical categories and theoretical material of Section 5.2.3.

#### 5.2.4.1 Relating the visual to the text

The photographs of learners are linked to the written text in three different ways: they are captioned, they are not directly referred to and they are placed at the end of written passages.

The captions of these photographs focus on the subjects' activity, which is presented as the main information and significance of the photograph:

- **Working together** (sic) to interpret a picture
- Working together on a project
- Reading and thinking
- Speaking, listening, thinking and writing
- Reading, thinking and discussing
- Reading, writing and thinking
- **Reading and thinking** (sic) about what we have written
- Writing, reading and thinking

Other details are not important and this is confirmed by the captions: they do not identify any learner, school, class or teacher. The reader must even deduce that these lessons show a whole language approach, as the written text on page 13 does not refer to the photographs at all. On page 36, there is an elliptical link with the photograph: "...while you have been doing this key activity, you will have had many opportunities to appraise your pupils (continuous assessment). You will have been able to see how they **are thinking, reading, talking, listening and writing.**" Page 37 has only photographs on it. As the photographs are only incidentally linked to accompanying written text, it is possible that they have been placed as "fillers" at the end of a unit. Possibly they are meant to relate to the theme of the booklet as a whole, in which case where they are placed is not important. In fact the biggest concentration of these photographs comes at the end, on page 37, just before the conclusion.

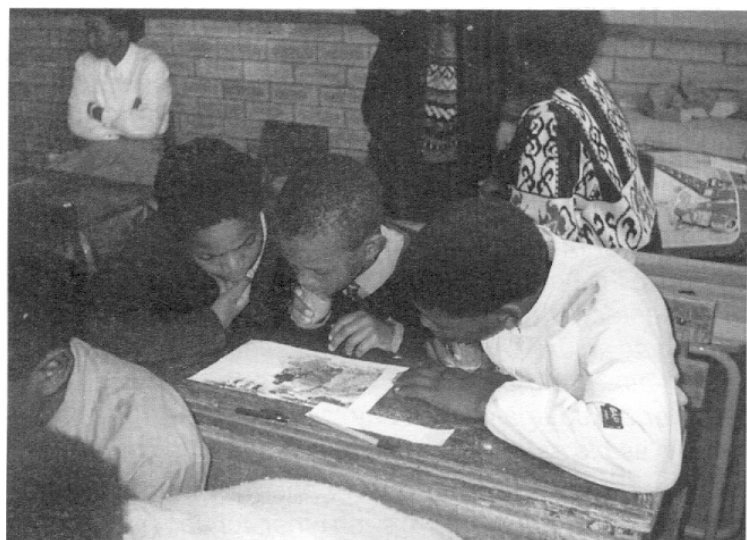
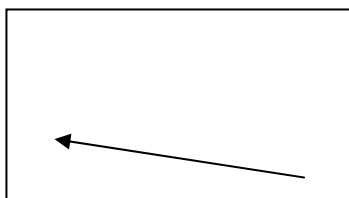
On the two pages on which written text appears, the photographs are continuous with it and a vertical reading path will lead from text to photograph. The vertical reading path signifies a hierarchy (or sets of hierarchies) from the general to the specific and detailed, from the abstract to the real and concrete, and that is the effect of these photographs. The text provides the theory of the Whole Language Approach and the photographs provide detailed concrete evidence of the approach in practice. This is highlighted by comparing them to the photographs of the contributors, who were named and placed **in** the text next to their account.

The learners on the other hand appear **at the end** of a written text to support it. They are nameless and objectified: evidence, not individuals.

#### 5.2.4.2 Visual processes

Although every subject in these photographs belongs to the same category, that of learners, they do not suggest a classification process. Subjects are not decontextualised or offered in a symmetrical composition. Every photograph shows details of the setting: walls, tables, chairs and Rotatrim boxes. Nor do they suggest an existential process: the informative value of these photographs lies in what the subjects are **doing** rather than what they are **being**. These photographs prove that learners can and do work profitably when skills are integrated in a literature-based whole language approach. Therefore they suggest a **narrative process**, an **analytical process** and a **mental process**.

The visual element which suggests a **narrative process** is the vector, a line which draws the eye into or out of a photograph, suggesting movement and thus a “story” for the visual text. Kress and van Leeuwen (1996:57) maintain that “the hallmark of a narrative visual ‘proposition’ is the presence of a vector: narrative structures always have one, conceptual structures never do. In pictures, these vectors are formed by depicted elements that form an oblique line, often quite a strong, diagonal line.” The vectors in these photographs all follow similar paths, leading the eye into the composition (Appendix 17 p134). For example:



*Working together to interpret a picture*

In this example, the straight line of the vector pulls the eye into the photograph and connects learners to each other, but where the line is curved it links the learners in the composition. The two movements or narratives suggested by the vectors are the inward focus of the learners on the work (straight vectors), and their co-operation in the group experience (curved vectors). Their inward focus is emphasised by the back views of learners in five of the photographs.

In addition to expressing a narrative process, these photographs suggest an **analytical** process, presenting us with a situation to analyse for its qualities and the attributes of its subjects. The photographs show a successful lesson in progress, and the most noticeable attribute of the learners is their concentration on the task. One of the effects of learners having their backs to the camera is that the reader is an invisible presence, a fly-on-the-wall spectator, moving silently between the desks as a teacher might to assess the learners' application and focus. The reader might also note the threadbare realism of the photograph. These learners are not aware they are being photographed; they have not prepared themselves specially and many variations of school uniform are apparent. In both respects these photographs are strikingly **unlike** photographs that usually emerge from school environments, in which subjects are neat, uniformed and facing forward.

Kress and van Leeuwen (1996:57-77) define **mental** processes as those narrative processes in which a subject is connected to his or her thought by a vector, most clearly demonstrated by cartoon thought bubbles. However, I believe there is a case for claiming that these photographs of learners represent mental processes. Sometimes the vector parallels a line formed by the heads of the subjects (photographs 1/13, 1/36, 1/37, 3/37, 4/37), drawing attention to what is going on **inside** those heads. In many of the photographs there are also two significant hand gestures. One is to the face or head, indicating deep thought and suggesting a mental process. The second is a hand laid on or pointing to a page on the desk showing involvement with or thought about what is written there, which again suggests a mental process.

#### **5.2.4.3 Visually creating a relationship**

The relationships depicted **in** the photographs are therefore learners' relationship with materials or with other learners as they negotiate meaning and complete tasks. The

relationship of the learners with the **readers**, expressed by the gaze of the subject, size of frame, perspective, camera angle, modality and composition is somewhat different.

#### **5.2.4.3.1. The gaze of the subject**

I suggested that the inward focus and the glances of the subjects depict mental processes. Learners' glance either downward, to the work on the desk, or across the group to other learners as they listen to discussions of the work. The gazes of these subjects do not reach out to the readers or establish a relationship with them. The photographs of the learners do **not** constitute an image act, demand any attention of the reader or make any contact with them. The fact that we are presented so often with the backs and back shoulders of the subjects is again proof of this.

#### **5.2.4.3.2 The size of the frame**

In all cases the photographs of learners show a medium or a medium long shot, including part of the subjects' bodies and also some of the background, although often lighting makes the background indistinct. They are post-card size. These learners have been photographed showing the kind of distance that teachers usually keep from their pupils as they move around the classroom. This suggests a social distance and level of emotional involvement that teachers are familiar with. Closer would be an invasion of privacy for the learner. These medium shots allow the reader to see the cooperative learning of learners in groups. Teachers would want evidence that all or most of the learners are focusing on their work, and the photographs provide that evidence. The written text which accompanies these photographs suggests the same social distance: as mentioned before, subjects are not referred to as individuals. The focus is all on what they are doing, and it seems it would not matter to the writers or readers who or where the subjects are, as long as they are “**thinking, reading, talking, listening and writing.**”

These medium long shots are accompanied by language Kress and van Leeuwen (1996:135) would identify as “social” language: “In ‘social’ language speech is still informal, but will tend to steer clear of all too easy-going colloquialisms, and retain a hint of formality. ... The language needs to be more articulate, more verbally explicit, so that non-verbal expression is no longer as important as in intimate and personal style” Although this is less formal than the

language we usually associate with text-books it is also accompanied by equally informal photographs, and so the visual matches the written text in this regard also.

#### **5.2.4.3.3 Perspective**

Because the photographs of the learners are medium-long shots, background and some detail are included and provide naturalistic perspective, although it is somewhat murky. The naturalism suggests that the relationship is of the kind we might have if we were really present – the relationship of a teacher to a learner. If the perspective is naturalistic this projects objectivity and “truthfulness” about the situation being depicted. It asserts an important point to the readers: that the integrated learning approach works and will work for the readers in their own classes.

#### **5.2.4.3.4 Camera angle and height**

The angle from which a photograph is taken is crucial in representing the power relationship between the reader and the subject, and all of the photographs of learners show them from above. The superior height of the camera mimics the view teachers commonly have of their own pupils as they stand or walk between the desks. Thus it suggests the kind of power relationship between reader and subject that teachers have with their own learners. But the writers are not looking down on the **readers**. Rather, the readers accompany them as an invisible presence, so invisible that not one of the subjects acknowledges them in any way. Thus although the angle is one which expresses power over the subject, it does not at the same time suggest power over the reader. Instead it suggests that the reader is a partner in this educational enterprise.

#### **5.2.4.3.5 Modality**

As I discussed in 5.2.3.3.5 (page 86), modality in visuals is achieved by the extent to which they attempt to present a “true” representation to the reader. The least contested source for this sense of unassailable objectivity is the photograph, which would mostly be received by the readers in this way. It is significant therefore that the dominating visuals in this book are photographs rather than the icons or sketches.

The photographs of the learners are not highly processed, highly essentialised, highly idealised representations. This gives them an open and interactive rather than a closed and authoritarian feel. Kress and van Leeuwen (1996:26) suggest that inserting many photographs into a text with large print provides immediacy, suggesting that the world is a simple place easily apprehended on a physical level. In line with this notion, the photographs in the *Whole Language Booklet* suggest the simple, obvious and familiar world of the classroom. The captions explain what we cannot see but what we see is true from the learners' body language: that the learners are intensely focused on their work. This world appears more real as it is a bit battered and poor, with raw brick interiors and old desks and chairs. Some subjects do not have school uniforms. The home-photography, snap-shot quality parallels this sense of unpolished reality: subjects are not posed and black and white reproduction gives surfaces a grainy, rough texture. The combined effect of subject and production is to suggest that the lessons promoted in this course will work in the unvarnished poorer schools of the Eastern Cape. Kress and van Leeuwen's (1996:163) criteria for judging visual modality in photographs also suggest a high modality for these photographs:

- **Naturalistic colour.** Black and white photography would suggest that these photographs have low modality, but on the other hand they resemble newspaper photographs which have the high modality of "truthful reporting."
- **Background detail.** The more context and setting, the higher the modality, and in these photographs some background detail is always distinguishable.
- **Levels of abstraction.** The least abstraction suggests the highest modality and these photographs are not abstracted in any way.
- **Naturalistic depth, brightness and illumination.** The use of a flash has reduced the impression of naturalism, but as the foreground and background are both clear and details reasonably distinct there is sufficient naturalism for modality to be quite high.

This reasonably high modality suggests that the writers are being transparent in their claims, and that the teaching approach they advocate is suited to the Eastern Cape. High modality also suggests that the writers are anxious to establish their credentials with readers and make efforts to appear truthful. This in turn suggests a power relationship with the readers which, in the **visual** mode, is more that of equals. This contrasts with elements of the written text where writers (modestly) establish themselves as experts, referring to their academic contacts and using authoritative forms such as imperatives. It expresses the tension between the writers' desire to acknowledge the readers as co-professionals and their need to write in a clear, authoritative way to readers whose time and English is limited. These different

messages produced by the written and the visual modes express the writers' need to negotiate these two positions.

#### 5.2.4.3.6 Composition and salience

Composition suggests that the photographer has deliberately placed subjects so that they create forms within the picture, but for the *Whole Language Booklet* these learners have clearly not been asked to sit or stand with particular relationship to each other. This lack of regard for composition gives them the unplanned 'snapshot' quality referred to earlier.

Salience suggests that the eye is drawn to an item in the photograph which has been given deliberate or unconscious emphasis by the photographer. It is commonly created by foregrounding to make an object appear large. Light or dark items can have salience if they stand out from their surroundings. Shape can play a role also and the reader trained in Westernised verbal literacy will follow a line moving from top left to bottom right and focus there. It is interesting to note in this regard that the vectors (Appendix 17 p134) lead **into** the picture (bottom right to top left) rather than in the reading path usually followed by a reader. Composition and salience features which photographs have in common are:

- A line or triangle formed by the heads of the subjects (photographs 1, 3, 4, 5).
- The eye is frequently drawn to the page on the desk because of its whiteness, focusing on it in much the same way as the subjects do (photographs 1, 3, 4, 5 – especially marked in this photograph – 7, 8).
- The eye is also drawn to the white shirts of learners the same reason (photographs 1, 2, 3, 4, 5, and 7).
- Hands touched to the face or laid on a sheet of paper have prominence through the line formed by the leaning arm or the contrast of black on white (photographs 1, 2, 3, 4, 5, and 8).

These composition features may not have been deliberately created but there is authorial intention in that writers probably took the photographs and in that they chose the photographs. This choice highlights the interests of the writers: again and again the eye is drawn by composition or salience to the heads of the subjects, to the work in front of them or to body language which suggests focus on the work or with thinking. The writers only chose photographs which show the learners “**thinking, reading, talking, listening and writing.**”

As has been mentioned in other contexts, subjects in these photographs are turned away from the reader, suggesting a lack of interaction. Kress and van Leeuwen (1996:122) suggest that this signifies exclusion. In the *Whole Language Booklet* the number of back views suggest that the reader is excluded from the world of the learners, which is a world focused on learning and work. It suggests that in classrooms where integrated learning takes place the learners, not the teachers are in control. It also contributes to the unposed naturalistic truthfulness referred to previously: these photographs are unlike the usual posed school photographs with learners in straight lines facing the camera.

#### **5.2.4.3.7 Summary**

As a group, these photographs of learners communicate the writers' concern for transparency, and their need to communicate this reassuringly to the readers. A claim such as "This really works! It worked in Eastern Cape schools for us and for other readers" might seem suspicious to readers or draw derision from those who have been less successful with this approach. Instead the writers have chosen a less explicit but more reality-based mode for the identical claim: the photographs are evidence and reassurance combined. The writers' apparent need to provide visual credentials might reflect their awareness that many teachers are suspicious of new methods. Some of this suspicion may be a legacy of apartheid, or an ordinary resistance to change, as discussed on page 74. Readers may also believe that what works in advantaged schools will not work in poorer schools with large classes. Therefore the photographs capture some of the poverty of the teaching environments, and there is guidance in the text on coping with a lack of resources: "If you have a very big class, this could be quite expensive, especially if your school does not have photocopying facilities" (p27). The photographs are the visual equivalent of this verbal awareness and reassurance.

It seems then that both groups of photographs have the same function in two different contexts: to provide concrete evidence of the writers' claims. It suggests that visually the writers are anxious to provide proof, to establish credibility and to assert the equality of the readers. As mentioned before, this contrasts with the relationship established through some of the linguistic strategies.

If one revisits Scollon and Scollon's (1995) notion of politeness with regard to these photographs, it seems that in this mode writers also lean towards involvement strategies,

using photographs to show a strong interest, and claim (literally in the case of the photographs of learners) a common point of view.

### 5.2.5 The woodcut of the story teller



In the *Whole Language Booklet*, there is only one other visual: a lino- or woodcut, captioned “Zozo Figlan telling a story in 1992 at the Weekly Mail Storytellers’ Market in Cape Town” (p3). It shows a large middle-aged woman at the most exciting (or terrifying) moment in the story she is telling children, stretching out her arms and opening her mouth and eyes wide to emphasise her point. Her clothing is multi-patterned and elaborate, reminiscent of the bulky traditional dress of Herero

women, and this, her outstretched arms and her size make her the focal point of the visual. The background is a rural landscape but her listeners are a multicultural audience with modern hairstyles and dress.

In its representation of the child subjects the woodcut is strikingly similar to the photographs. They are shown **thinking** and **listening**, absorbed by what they are doing and oblivious to the presence of the recorder of the event (photographer or artist). The difference is the presence of the teacher-figure in the form of the story-teller, and although this dominating figure makes the woodcut appear substantially different in terms of content, in fact it is not. Using the criteria previously used to interrogate the photographs reveals the following:

#### 5.2.5.1 The gaze of the subject

The gaze of the subject is downward (to the children) and outward (to the viewers of the woodcut) including both in the excitement and drama of her story. The connection she makes with readers suggests a verbal and analytical process: the meaning of the visual is contained in **that** she is telling a story and **how** she is telling the story. She is identified in the caption

as a real person, but she also has a powerful symbolic value, suggesting the power and magnetism of the traditional African woman. She is the archetypal teacher-story-teller who intrigues and fascinates children in her care, in this case the children of a racially integrated South Africa. These children react with a mixture of fascination and fear. Some seem absorbed, but one (to the left) may be hiding behind another. Like the photographs of learners, they are grouped around her in a naturalistic way, some with faces visible, others half turned away and two at least with their backs to the reader. As in the photographs of learners, these back views have the effect of excluding the reader.

#### **5.2.5.2 The frame: size and shape**

The outline of the woodcut is not square, nor is it given a frame of its own. This means that the story-teller and the outward-radiating lines which suggest her story blend into the surrounding page. The radiating lines expand from the square base surrounding the children to surround the story-teller: she and her story are larger and more important than the world of her auditors. The story takes the readers back into a rural and traditional environment, an historical but undefined time and place.

#### **5.2.5.3 Perspective, angle and height**

The woman's body proportions are fairly realistic, although her size is slightly exaggerated compared to the listeners, and is accentuated by her flamboyant clothing and the fact that she is standing while the listeners are sitting. She dominates both her audience and the landscape. The woodcut shows most of the story-teller (except her lower legs and feet, concealed by her audience), but very little of the children's bodies. Like the photographs of learners, the focus is on the listeners' heads, where they are thinking about the story, and the expressions on their listening faces.

The relation of the story-teller and the listeners to the background is not naturalistic however. In the far uppermost distance, trees, hills and clouds suggest a rural idyll. The area between the listeners and this environment is filled by decorative radiating lines and the story-teller's outstretched hands. This suggests that the listeners are separated from the distant landscape. This might mean that the distant world is part of the story they are being told, or it might

suggest a pre-industrial past out of which this elaborately dressed story-teller comes and which is her inspiration.

#### **5.2.5.4 Modality**

When compared to the realism offered by photographs, it does not appear that the woodcut contains much modality. On the other hand the woodcut depicts a real event. Also, although some proportions are exaggerated, they are not exaggerated beyond the possibilities offered by photographic techniques. The same applies to the merging of foreground and background and the representation of the subjects. The artist has achieved realism not very unlike that of a photograph, so although a different mode is being used, the woodcut is equivalent to a photograph in terms of representing reality.

#### **5.2.5.5 Composition and salience**

The viewers' attention is drawn by the story-teller's size and her elaborate patterned clothing as well as the contrast between the dark decorations of her clothing and the white background. The composition is in the form of a triangle, with lines running up the story-teller's wide crinoline-like skirts, through the open lapels of her jacket to the apex of the triangle at her head. This makes her face the most arresting feature, with its glowing cheeks, open mouth and staring eyes. The listeners form the base of the triangle and their faces, clothes and bodies blend with each other and with the hem of the story-teller's skirts. As in the photographs, they are not presented as individuals. The only significant difference is that the woodcut contains children from different race groups.

This suggests readers should align themselves with this charismatic and powerful figure, but the fact that it is **not** a photograph suggests that the writers are presenting an ideal rather than a real identity for their readers. The woodcut seems to offer an archetypal figure against which they can measure their own enthusiasm and magnetism. By presenting this ideal in a woodcut rather than a photograph the writers are making the difference between them less glaring or threatening. It also suggests that the writers are not expecting this level of story-telling from the readers.

### 5.3 Conclusion

In combination the visual elements suggest that the writers are driven by two main concerns: firstly to give clear direction to the readers of the coursework book and secondly to establish their suggestions and assignments as practical, valuable and workable for the classrooms in which the readers find themselves.

Their concern for the readers to find their way easily through the material is established verbally also, as Chapters 2, 3 and 4 suggested. Visually it is suggested by layout features: the central panel of text with its icons, bolding, and bullets, the conservative top-to-bottom reading path, the large font and small paragraphs. It suggests that writers do not have much confidence in readers' ability to find their way through the text, to follow instructions or to complete assignments easily. Their concern for readers as students is largely responsible for the un-academic quality of the booklet already commented on.

The second concern the writers reveal is that the readers should believe that the approaches and the lessons they recommend will work. Visually this is expressed through the many photographs of contributors and learners. The need to provide this kind of evidence suggests that readers may be conservative, resistant to or resentful of change, suspicious of what they are being asked to do. It further suggests that as students they are easily discouraged or intimidated by what is new, and need constant encouragement to experiment and develop.

Both of these identities run counter to other identities which the writers construct verbally for the readers, of equal and co-professional which I explored in earlier chapters. In reality I believe that these identities co-exist in the minds of the writers, and probably in their relationship with the readers. This text is therefore a written example of an ongoing negotiation of the writer-reader relationship.

## Chapter Six: Conclusion

In this concluding chapter I try first to draw together the threads of the analysis and to suggest issues highlighted by the identities and relationship features that emerge. I then look at limitations of the study and suggest further avenues of research. Finally I suggest the potential value of this study for other writers of distance materials.

### 6.1 Identities and relationship features of the *Whole Language Booklet*

The *Whole Language Booklet* seems to create for its readers and writers two sets of identities, with interplay of power on two levels. The verbal-visual text creates for the readers a first identity as inexperienced students who therefore need the assertive, clear directions of confident writers. In this identity the readers are dependent, and perhaps also insecure, uncertain and anxious while the writers are supportive, sympathetic to their needs and authoritative. At the same time the text creates for the readers a second identity as mature, responsible community members for whom the writers deferentially down play their status as academics and offer proof of the claims they make. In this identity the readers have the status of esteemed co-professionals while writers show respect for their language and cultural heritage. The subtle movement between these positions produces the contrasts and apparent contradictions in the text. Kress (1989:12) asserts that “texts are therefore manifestations of discourses and the meanings of discourses, and the sites of attempts to resolve particular problems.” The particular problem which emerges from an analysis of the *Whole Language Booklet* is the control-independence balance of the relationship between lecturer-writers and their adult, professional distance students.

An analogy to this control-independence dilemma of the writers is the dual role of parents on the issue of independence and control of a maturing child. Parents have constantly to assess how much trust and independence can be given or how much control is necessary, while moving ideally towards complete trust and total independence. If parents are too controlling they run the risk of creating an unhealthy dependence; if they give independence too soon the child may be endangered. Their problem is to keep an appropriate balance between these two opposing dynamics while allowing a gradual shift towards independence.

In a similar way, the writer of a course will need constantly to assess how much independent work can be expected of the students and how much control is necessary while ensuring a steady movement towards independence, not only of work but also of thought and action. If writers are too controlling the students may never be able to perform satisfactorily as students and potential academics, but if they insist on independence too soon, the results may be failure and discouragement. Their constant problem will be keeping an appropriate balance between independence and control. The crucial word here is **appropriate**. While this is difficult to judge for an individual, the problem becomes acute for distance students who lack the day-to-day contact which would enable writers to assess their needs for more or less support, scaffolding or independence. Therefore those who design distance materials like Rowntree (1992) place emphasis on a good knowledge of one's audience.

I believe that there is a powerful opposing dynamic at work in all such texts, which will emerge from an intensive analysis. It is a conflict however that does not need to be resolved or explained away, as it is a necessary and constant part of the writers' relationship with a changing and maturing group of students. The duality of writers' and readers' positions is perhaps more obvious in the *Whole Language Booklet* because the writers have chosen to break with the formality of accepted academic styles. (In other texts formal conventions might largely mask such a relationship). But it is a duality which can be taken into account and incorporated somehow into teaching texts especially when communicating with mature students on in-service training programmes.

In the *Whole Language Booklet* this dilemma, conflict or duality seems to suggest a number of identity and relationship issues which may have educational or social implications. In the section which follows I explore these issues.

## **6.2 Issues of identity and relationship operating through the text**

### **6.2.1 Issues of authority**

Previously (pages 12 & 73-4) I suggested it would be naive to imagine no hierarchy or power relationship existed in this writer-lecturer-reader-teacher-student relationship. However, the expectations about what it means to be a writer and presenter of a course, and what it means to be a student are changing. While much of this relationship is still based on (and formed by

early experiences of) classroom interaction, educational theory suggests different roles and relationships as an ideal. Celce-Murcia and Olshtain (2000:17) suggest that

Teachers in the new learning settings are expected to become reflective researchers who evaluate and rethink their approaches, attitudes, and methods of presenting new subject matter to students at every stage in the teaching/ learning process. They are no longer the only decision-maker in this process since learners share and become partners in the process.

The changing roles of teachers and learners (or writers and readers) make their interaction potentially a site for change and innovation as each tries to establish a new role and identities appropriate to new demands. I would like to suggest that an awareness of these new roles may partly explain the tension in the *Whole Language Booklet* between the modesty displayed by the writers regarding their academic credentials and the authoritative position suggested by (for example) imperatives. In line with the relationship suggested by Celce-Murcia and Olshtain above, the writers present themselves as mentors and mediators of the work and adopt a correspondingly lower authority profile. In some areas they adopt an egalitarian position which aligns with utilitarian principles discussed on page 9. At the same time hierarchy still exists and credentials need to be established, and these find their way subtly into the text. Furthermore the readers may have expectations of a teacher-student relationship based on authoritarian relationships of their own educational experiences in apartheid South Africa. If they do not receive clear instructions they may become confused and demoralised by a lack of direction, and writers may be aware of this also.

### **6.2.2 Issues of trust**

By using visuals as evidence the writers of the *Whole Language Booklet* express their need to gain the trust of the readers. This trust needs to be established on two levels: firstly writers need to present themselves as trustworthy, which they do through allusions to academic situations such as conferences. Secondly they need to present their approaches and teaching methods as trustworthy. Some of the negotiation around this issue may result from the perceived inadequacy of new approaches and theories to solve teachers' problems, especially in impoverished rural schools. Rees (2000:64) claims that

Worldwide, teacher education continually faces the complex challenge of integrating the theory and the practice of teaching in such a way as to develop practitioners who are academically competent in their subject or phase or

specialisation, and also in their ability to teach effectively in the classroom. This is problematic for all beginning teachers, but the problem is exacerbated for rural teachers. Most of the universities in South Africa are located in cities, far from the realities of the rural schools where most of the population will be educated. This must mean an inevitable dilution of attention to the difficulties inherent in learning and teaching in isolated and impoverished schools.

To teach effectively, readers will have to adopt new approaches in an epiphany of commitment, so it is crucial for writers to gain their trust. Otherwise readers may revert to counter-productive habits and the benefits of their training will have been lost. The writers show an explicit awareness of this problem and warn against it (page 32, quoted page 32).

### **6.2.3 Issues of the “everyday” and the “scientific”**

Another problem writers of this course seem to be facing is one common to course providers who embrace Vygotsky’s notions of the Zone of Proximal Development (Donald, Lazarus and Lolwana 2002:102-121). This theory of learning suggests that there is a “zone” between learners’ present knowledge and the unknown, in which maximum learning takes place. New material should be close enough to learners’ current knowledge and experience to be recognisable by them, but different enough to challenge and interest them. As learners master new material the zone moves and they can be introduced to more unfamiliar and challenging material. Material too unfamiliar or far out of the zone will not benefit learners as they will not be able to relate it to their current knowledge. A first implication of this is that teachers should find out what learners’ current zone is. They might make assumptions, as the writers of the *Whole Language Booklet* have done, about learners’ interests and background and create relevance through links with this. A second implication is that teachers need to design a carefully calibrated advance from the familiar to the unfamiliar. Again, there are traces of this movement in the *Whole Language Booklet*, where writers use the familiar intsoni in an unfamiliar teaching approach. The advance from familiar to unfamiliar should take place on the linguistic level also. Recent educational theory suggests that learning happens as learners are drawn from familiar, spontaneous, “everyday” language to unfamiliar, learned, “scientific” language (Wells 1999:3-51). Again, writers of the *Whole Language Booklet* seem aware of the need to introduce concepts slowly and clearly, glossing new words and using plain, direct language.

#### **6.2.4 Issues of acknowledging prior learning in under-qualified professionals**

Another aspect of modern education theory which seems to influence writers of the *Whole Language Booklet* is that of recognising prior learning. This suggests that formally and informally it is important to affirm and if necessary use expertise learners have already developed. In the *Whole Language Booklet* writers affirm readers' expertise in their household and community. The problem for writers is that they must simultaneously acknowledge the knowledge and skills learners have already acquired and the academic standing they still wish to acquire (that is, their **lack** of knowledge or skill). Readers are therefore at the same time experts, equals, co-professionals meriting respect and acknowledgement, and ignorant learners needing a great deal of instruction, structure and guidance. This potentially creates ambivalence in the way a writer treats, views and constructs readers, which finds its way into the deep structures of a text.

#### **6.2.5 Issues of ownership and the economic imperative**

In Chapter 1, I mentioned that the *Whole Language Booklet* was “co-ordinated, illustrated and edited by” the authors who seem also to have made design and printing decisions. This gives the authors a unique ownership of the text: no-one was involved who was interested primarily in its commercial success. Specifically it means the text had only to meet their own educational standards in order to be published. Hyland (2000:104) maintains that

[University text books] tend to have a peripheral status and are frequently seen as commercial projects unrelated to research. Indeed, textbook writers are often viewed as not participating in a disciplinary discourse at all, but a pedagogic one – a practice somehow vaguely grubby and mercantile rather than scholarly. ... Textbooks, in fact, play an important role in professional practice, standing as representations of disciplinary orthodoxy while providing a medium for writers to disseminate a vision of their discipline to both experts and novices.

The *Whole Language Booklet* has side-stepped the “mercantile practice” and this might be a contributing factor to its unique voice. As an unfettered academic enterprise it has enabled the writers to “disseminate a vision of their discipline to both experts and novices” in an unusually direct communication. These writers are more direct and personal possibly because they are more independent and experimental. Together with the face-to-face sessions, trialling materials in local classrooms, involving local community members, this helps create the environment which builds a relationship with their readers.

### **6.2.6 Issues of hierarchy and egalitarianism**

In Chapter 1 I suggested that individuals from highly hierarchical environments may experience a disturbing disjunction when they encounter egalitarian principles. It seems likely to me that this problem may exist in the *Whole Language Booklet*. It is possible that the readers, coming from work environments and possibly home environments which are hierarchical in nature may misunderstand the egalitarianism expressed in the booklet and also misunderstand this construction of their identities. This might create confusion by offering opposing and unfamiliar roles for them. On the other hand, being at a crossroads of professional change, they might be able to adopt these new identities as appropriate for democratic South Africa.

### **6.2.7 Issues of relevance and stereotyping**

The issue of relevance and stereotyping was mentioned at the conclusion of Chapter 2 (page 36) and is a problem common to texts which create relevance by relating closely to learners' real identities. By focusing too narrowly on known features of learners' identities and context, and affirming readers as they currently are, writers may narrow readers' options for growth. They would be keeping the Zone of Proximal Development (see p105) too close to learners in some areas of their cognitive life. It might prevent readers from expanding outside limited current roles and embracing change. It runs the danger of keeping learners in stereotypical roles they may wish to leave as part of improving their qualifications. Writers' rhetoric (quoted page 32) suggests that they are teaching for change, and they may need to negotiate a pathway through the opposing choices of creating relevance and reinforcing stereotypes.

## **6.3 Limitations of the study**

The main limitation of the study lies in its scope: that none of the hypotheses were tested by investigating readers' actual experience of the text or writers' actual purposes in producing it. This is a limitation of Discourse Analysis as a method which I acknowledged in Chapter 1. The validity of this study lies in offering explanations which are plausible because they are rooted in the data and because they acknowledge the context as far as possible. But these explanations might not be the only ones, nor have taken sufficient account of the whole

context. Had I researched the context in greater detail, the explanations might have been richer. It also suggests that observations made in this study are open to reinterpretation. Hyland (2000:18) offers a relevant warning for studies of this kind:

While we can learn about texts by studying social action, we cannot just read off social action from texts. Participants may not always act strategically and they always have the option of adopting a personal or idiosyncratic relation to the text. So while we might point to possible norms and conventions as reflecting ideological behaviour, we must always recognize that the social world is not always a stable and predictable place. ... The important point is, however, that texts reflect writers' expectations of how they will be read, and therefore provide clues to the wider understandings underlying their creation.

A second limitation of the study lies in the size of the text: large for a detailed analysis but still a small proportion of the whole course. For this reason I do not claim that the observations apply to the whole series although it is probable. The unique production process gives these authors more control than most.

A third related limitation is that the *Whole Language Booklet* is an early text (Booklet 9). As part of the development of the course, power relationships may change between writers and readers in later texts, giving readers more independence. The study does not explore this possibility.

#### **6.4 Further avenues of research**

The first avenue of further research is suggested by the limitations of the study: that there is room for more detailed investigation of the contexts in which the *Whole Language Booklet* is produced and used. This might include interviews with writers and readers as well as some investigation of how the materials are used in, for example, the face-to-face sessions. Such an investigation may provide more insight into this specific situation which would be useful to writers of this and other courses.

A second avenue of research is suggested by the growth of teacher training by distance education in South Africa. No doubt many innovative texts such as this one are being produced in this field. A greater knowledge of these many texts will be useful to educators involved in writing distance course material. Hyland (2000:5) suggests that "Genres are also in a state of constant evolution as members respond to professional and private exigencies in

new and innovative ways.” An understanding of strategies suited to local students should benefit all who design these courses. Work of this kind has been done by the South African Institute of Distance Education and some of the findings have been published in issues of *Open Learning through Distance Education* (Reed 2004 pers. com).

A third avenue is suggested by the methodology. Using an analysis of visual elements together with discourse analysis provided confirmation of insights gained through analysis of the verbal text. It also supplied insights which seem not to be accessible through a study of the verbal text. Kress (2000:337) suggests that “it is now impossible to make sense of texts, even of their linguistic parts alone, without having a clear idea of what these other [visual] features might be contributing to the meaning of a text.” Where it is clear that the same authorship is behind both verbal and visual, an additional analysis of the visual seems to widen the options open to a researcher.

### **6.5 The potential value of this study**

A deep examination of the text, located around the identities of the readers and sensitive to the power axis on which the writer-reader relationship is predicated, reveals ways in which the writers negotiate conflicting positions and consciously or unconsciously attempt to resolve “discrepancies, contradictions and disjunctions” (Kress 1989:14). More usefully for writers of similar texts, it identifies issues which may need to be negotiated. The writers of this text have used some strategies to create relationships, to hold duality and opposing identities in balance. Writers of other texts may use other strategies, but in the expanding field of South African distance education today these oppositions, dualities, contradictions and changes will have to be negotiated **in some** way or other. Kress and van Leeuwen (1996:47) assert that

The previously secure ‘scripts’ have become and are becoming unstable, and new practices for which no scripts yet exist are coming into being. Previously distinct practices, the domains of distinct professions, the clear boundaries, all of these have begun to unravel... The practitioner in the new domain now has to take a multiplicity of decisions, in relation to a multiplicity of modes and representations which were previously the domain of discrete professions and their practices.

This study has revealed how the writer-reader relationship can be negotiated in a text. I am sending a copy of this study to the writers and editors of the *Whole Language Booklet* and

look forward to their response. They have explored new and interesting ways in which a writer-reader relationship can be negotiated in a verbal-visual text which I believe will contribute valuably to decisions made by other writers with similar readers.

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## Appendices

### Table of contents

Appendix 1: Xhosa words and phrases	115
Appendix 2: Uses of <b>we</b> which include the readers	116
Appendix 3: “Feeding image” quote p12-13	117
Appendix 4: Figurative language	118
Appendix 5: Implied negatives (including <b>more</b> and conditionals)	119
Appendix 6: Statements of general fact	121
Appendix 7: Statements of fact undercut by conditionals or hedges	122
Appendix 8: Modal verbs	123
Appendix 9: Conditionals	126
Appendix 10: ‘Loose’ questions	128
Appendix 11: Giving choices	129
Appendix 12: Contexts which suggest the expert	130
Appendix 13: Sample page of layout (page 26)	131
Appendix 14: Icons	132
Appendix 15: Right hand text boxes	133
Appendix 16: Photographs of contributors to the intsonkomo	134
Appendix 17: Photographs of learners with vectors	135
Appendix 18: Cover page of the <i>Whole Language Booklet</i>	138

## APPENDIX 1: XHOSA WORDS AND PHRASES.

- Umthamo (p2)
- Iintsomi (p2)
- Amasi (12)
- It never missed a liar, even if the liar was to use ‘umkhwenkwe’ for washing. (People used this umkhwenkwe to bring them luck, and to give them power to conquer evil spirits) (p14).
- UmKhwezeli (p16)
- Eventually she remembered parts of a story behind one particular idiom, ‘Ayikho impungutye kunene. Zonke iimpungutye ziya lingana.’ (p16).
- The river was actually called ‘umlambo otshayela amaxoki,’ the river which drowns all liars (p17, 26).
- Phela, phela ngantsomi (p21)
- For example you might have tried to recover the tale or intsomi behind ‘undibambise iliwa’ you left me holding the cliff (p22).

## APPENDIX 2: USES OF WE WHICH INCLUDE THE READERS

- It has been said that it is an “accident” that we have come to think of literature in this way (p1).
- In this umthamo, we are going to look at a way of teaching language which fits in with Outcomes Based Education” (p1).
- In this umthamo we are concerned with *oral literature* (p2).
- It is high time that we caught up with other parts of the world ... (p1).
- If we want our children to grow up into truly **whole** human beings, we should think about whether this fragmented (broken up) curriculum is a good way... (p12).
- Perhaps we need to think of the school curriculum in the same way (p12).
- We sometimes have regular times to do certain things. But we don't have a rigid timetable for the jobs that we do in daily life (p12).
- And when we put things *together*, it makes it easier for children ... (p13).
- One really wonders why we split up the school day... (p13).
- When we tell a story orally, the people listening influence the way the story is told (p22).
- “A **terrible** thought is that when these old people are no longer with us, a link of the chain that holds oral storytelling together, will be broken” (p22).
- If we want to involve our communities more in the education of the young... (p25).
- If we want to see change in education, new ideas need a chance to become part and parcel... (p32).
- If we focus on what learners **can** do, they see themselves as succeeding (p36).
- But remember, when we focus too much on what our learners **cannot** do, there is a great danger that they will see themselves as **failures** (p36).

### APPENDIX 3: “FEEDING IMAGE” QUOTE P 12 / 13

We remember talking to Hugh Hawes a few years ago. He was at a special workshop in Cape Town on the Child-to-Child approach to Health Education. Lots of different people were there. There were people from Early Childhood. There were people from Health Departments. There were doctors and teachers, community workers and people from youth organisations.

*Hugh Hawes is well known for his book “Curriculum and Reality in African Primary Schools” (1979)*

Hugh Hawes said that a good question to ask about any Primary Curriculum is, “Does it **nourish** the child’s growing mind?” That led to other interesting questions.

- Is it a balanced diet?
- Does it contain the right amount of the right kinds of knowledge and the right balance of experiences?
- Is it appetising?
- Is it served up in an interesting and enticing way?

If you think carefully about what he was saying, it means that to serve nourishing food, you have to think of putting together interesting meals, made up of a number of different ingredients.

Perhaps we need to think of the school curriculum in the same way. Putting things together helps make for more sen-

sible learning. And when we put things *together*, it makes it easier for children to make sense of what they find put in front of them in school classrooms. One really wonders why we split up the school day into all those neat little 30 minute periods?

People don’t feed their families meals as separate items, such as, first eat some dry porridge, then have a small bowl of amasi, then swallow a pinch of salt. Now take a slice of bread, followed by a spoon of butter, and then a spoon of jam. Then finish off with a cup of hot boiled water, followed by a spoon of coffee grains, and finally, two heaped spoons of sugar. (No need to stir!)

## APPENDIX 4: FIGURATIVE LANGUAGE

### Building

- The art of ... (x2) p2
- Use as a base p2
- Be able to design and provide... p3
- Integrate (x2) p3
- They formed p10
- Wove a lot of humour p10
- Was extended and developed p11
- Put things together p12
- Able to piece together (stories) p22
- Modelled p27
- Make (decisions) p27
- Develop (a habit) p 32
- Build on (x2) p36
- Emphasizing and developing... p36

### Breaking

- fragmented (broken up) curriculum p12
- split up the school day p12

### Watching

- Look at (a way of teaching) p2
- See (the value) p2
- Watch (x3) p25
- Observe p25
- Focus on (x2) p36

## APPENDIX 5: IMPLIED NEGATIVES (INCLUDING MORE AND CONDITIONALS)

- We think that this approach to language teaching will make your language lessons more meaningful and more interesting for both you and your pupils (p3).
- When you have completed this umthamo you will be more conscious of how your teaching approach in the classroom affects the ways your children learn and feel about language (*Ibid*).
- When you have completed this umthamo you will be able to design and provide tasks for your pupils that integrate listening, speaking, thinking, reading and writing (*Ibid*).
- When you have completed this umthamo you will have an understanding of the value of providing activities that require your pupils to access, process, use and share information from various sources (*Ibid*).
- When you have completed this umthamo you will have had opportunities to see the value of using culture based experiences such as iintsomi, at school (*Ibid*).
- At home, transcribe what you have recorded. ... This will take a long time. But sometimes doing research takes time. Be thorough. Don't forget to include your informant's name and some biographical details of that person. Remember this is a degree course. Store this in your Concertina File (p26).
- Try to get a question from each group. Don't just ask the children who you can rely on to give you answers. Ask some of your more shy learners. Encourage everyone to participate (p28).
- Let them do this in a scribbler, or on rough paper. But if they work on rough paper, they will need to write their names on the pages, and they will need to keep them safe (*Ibid*).
- Again, only give the beginning of the story. You want your children to think about, question and predict what may have happened, what might happen, and why (p33).
- Don't forget, composing [making up and creating] is an important part of writing. Writing is not only the process of transcribing ideas onto paper (p36).
- But remember, when we focus too much on what our learners cannot do, there is a great danger that they will see themselves as failures. There is a danger that this will give them a sense of powerlessness (p36).
- Listen carefully yourself, and try to remember the story so that you can tell it yourself (p22).
- Just as you were advised in the umthamo, Learning in the World, you will have to approach them in a proper way. You are the one who needs the information. This person

may well have the knowledge you need. If you approach them in an appropriate manner, you will be able to collect your data (p25).

- If we want to involve our communities more in the education of the young, it is essential that the people in our communities trust us (*Ibid*).

## APPENDIX 6: STATEMENTS OF GENERAL FACT

- This approach to language learning and teaching does not divide language into different parts. It is about the links between *all* aspects of language (p2).
- Many people assume that the word ‘literature’ refers to stories, poems and plays that have been written down. But this is not true (p2).
- In high schools it has been the custom for some time to separate subjects. Sadly, this has filtered down into the primary school. So much so, that in some schools even aspects of one subject (or learning area) are divided into separate parts (p2).
- People don’t feed their families as separate items, such as, first eat some dry porridge... (p13).
- One of the wonderful things about stories that are *told*, is that there isn’t just *one right* or *correct* version. There are many. When we tell a story orally, the people who are listening influence the way the story is told. That is why stories that are told change with time and place. The storyteller makes the story relevant to the listeners (p22).
- In this way, more complete versions of a story can be recovered. A *terrible* thought is that when these old people are no longer with us, a link of the chain that holds storytelling together, will be broken. Many parts of the story will be washed down to the sea by the strong river of time (p22).
- This activity can be an important way to make your language work with your learners more learner-centred... (p32).
- Any primary school teacher knows that children take great delight in repeating an experience that they have enjoyed (p32).
- Writing is not only the process of transcribing ideas onto paper (p36).
- To focus on, and to build on the strengths of learners is a good way of working. Emphasising and developing strengths builds confidence (p36).

## APPENDIX 7: STATEMENTS OF FACT UNDERCUT BY CONDITIONALS / HEDGES

- Many people assume that the word ‘literature’ refers to stories, poems and plays that have been written down. But this is not true. *It has been said that it is ‘an accident’ that we have come to think of literature in this way (p2).*
- In high schools it has been the custom for some time to separate subjects. Sadly, this has filtered down into the primary school. So much so, that in some schools even aspects of one subject (or learning area) are divided into separate parts. *We suggest that this is unnatural (p2)*
- One of the wonderful things about stories that are *told*, is that there isn’t just **one right** or **correct** version. There are many. When we tell a story orally, the people who are listening influence the way the story is told. That is why stories that are told change with time and place. The storyteller makes the story relevant to the listeners. *When Viv was doing some research about using stories in classrooms... (p22).*
- This activity can be an important way to make your language work with your learners more learner-centred... *If you carry out this activity more than once... (p32).*
- *Don’t forget, composing [making up and creating] is an important part of writing. Writing is not only the process of transcribing ideas onto paper (p36)*
- To focus on, and to build on the strengths of learners is a good way of working. Emphasising and developing strengths builds confidence. *If we focus on what learners can do... (p36).*

## APPENDIX 8: MODAL VERBS

### 8.1 Modals referring to learners, p11&12

- “The children worked on a particular topic to find out all that they could, and then they reported on their findings” (p10).
- “In some cases the *learners* chose the topic they would research” (*Ibid*).
- “In other cases, the learners went out into their community to ask what the *community* would like them to investigate” (*Ibid*).
- “Children from all grades ... could be found working in the same group” (*Ibid*).
- “For example, ‘Good day. May I ask you something for my school research?’” (p11).
- If a learner could not spell a word, the respondent did the writing or spelt the word” (*Ibid*).
- The learner could even write the information as s/he pronounced it” (*Ibid*).
- When back in her/his group, any necessary corrections could be made with the help of the other group members” (*Ibid*).
- They felt they belonged to their community and that they could be of help in future” (*Ibid*).

#### On page 16 modal verbs refer to the tutors or umKhwezeli:

- “S/he could see how you concentrated while you were listening and writing” (p16).
- “S/he could note who spoke and who listened” (*Ibid*).

#### On page 17, modal verbs are part of the story of collecting an intsoni:

- “The master could tell the servant was guilty of lying” (p17)
- “Once, he even spoke of a bug and likened it to something terribly big, so big it couldn’t be true” (*Ibid*).
- “When we asked him about the story, he couldn’t remember the story...” (*Ibid*).
- “He promised to make an arrangement so that I could meet him [Steve Tshwete] in King Williams Town” (p18).
- “This person may well have the knowledge you need” (p25).

#### Modal verbs referring to the possible behaviour of the learners in readers’ classrooms.

- “Then they could share their different versions” (p16).
- “Some teachers were able to make enough copies of the story-beginning, so that their learners could work in pairs, and could share a copy” (text box p26).
- “Your learners can share one big copy between two learners” (p27).
- “Tell them to work in pairs, and **write** down *very quickly* all the questions that they can think of” (*Ibid*).

- “You want them to really **think** of all the questions that they can about the information which is **not** in the passage” (*Ibid*).
- “They may have to refer to the passage that they have read to check for clues to the answers” (p28).
- “Don’t just ask the children who you can rely on to give you answers” (*Ibid*).
- “If they really work at this part of the task, it should take them at least half an hour” (*Ibid*).
- You want your children to think about, question and predict what may have happened, what might happen, and why” (p33).
- “If we focus on what learners **can** do, they see themselves as **succeeding**” (*Ibid*).
- “Some of the things that your learners have done may disappoint you. You may realise that there are some things that your learners cannot yet do” (*Ibid*).

## 8.2 Modals directed at the readers

### CAN / COULD

- You could also **write** down questions you would like to **ask** about happened (sic) next (p14).
- What would happen *next* in your class, if you were to adapt this activity for you learners? You could tell or read the rest of the story. Or you could ask your learners to write their *own* versions of how the story might go (p16)
- You can write in isiXhosa or English (or even both!) (p21).
- Ask them if you can record the story as you listen to it (*Ibid*).
- You can choose Option A (in which the learners will read the beginning of the story), or option B (in which the learners will listen to you telling the beginning of the story) (p26).
- Or you could give them the rest of the story to read for themselves. Some other time, you could conduct a class discussion about the different versions (p28).
- This activity can be an important way to make you language work with your learners more learner-centred, and more integrated (p32).
- This time you can make some choices about the story you want to use (*Ibid*).
- If you enjoyed researching the intsome behind an idiom, then you could think of *another* idiom (*Ibid*).
- You could use the tale that you collected behind the very first idiom or saying (*Ibid*).
- You could use the tale that Steve Tshwete told Tillie (*Ibid*).
- As a teacher, you can choose to build on these things (p36).

### MAY

- You may be able to use the first two paragraphs, or you may need to use the first three (p27).
- You may want to include some in your Portfolio at the end of the year to show what you have been doing in your classroom with your learners (p29).

## SHOULD

- If we want our children to grow up into truly **whole** human beings, we should think about whether this fragmented (broken up) curriculum is a good way to help them to be *whole* (p12).
- We suggested that you should go to an elderly somebody in the community (p22).

## APPENDIX 9: CONDITIONALS

### IF YOU

- “If you are to understand how this approach works and if you are to see the value of working in this way” (p2).
- “If you think carefully about what he was saying...” (p12).
- “What would happen next in your class, if you were to adapt this activity for your learners?” (p16).
- “If you do, please write out the version you know” (p21).
- “If you do this during the holiday, it will save time next term” (p22).
- “If you approach them in an appropriate manner, you will be able to collect your data” (p25).
- “If you decide to *tell* the beginning of this story to your learners, you will do so much better if you have observed the story-teller carefully” (p25).
- “If you have a very big class, this could be quite expensive, especially if your school does not have copying facilities” (p27).
- “If you carry out this activity more than once ...” (p32).
- “... you are more likely to develop a habit for working in this way if you carry out this activity more than just once” (*Ibid*).
- If you enjoyed researching the intsoni behind an idiom ...” (*Ibid*).

### IF THEY, OR IF THE XXX:

- “If a learner could not spell a word, the respondent did the writing or spelt the word” (p11).
- “Ask that person if they will tell you a traditional intsoni...” (p22).
- “Ask them if you can record the story as you listen to it” (*Ibid*).
- “Ask them if they know other versions of the same story” (*Ibid*).
- “If there is somebody who has a reputation for telling stories well ... visit that person” (p25).
- “Ask that person if they know any stories behind your idiom” (*Ibid*).
- “Ask your informant ... if they mind if you tape-record the story (or stories) that they tell you” (*Ibid*).
- “But if they work on rough paper, they will need to write their names...” (p28).
- “If they really work at this part of the task, it should take them at least half an hour” (*Ibid*).
- “... if they [teachers] are asked to try out a particular task with their learners, quite often they do it just that one time” (p32).

### IF WE:

- “If we want our children to grow up into truly whole human beings ...” (p12).

- “If we want to involve our communities more in the education of the young ...” (*Ibid*).
- “If we want to see change in education ...” (p32).
- “If we focus on what learners **can** do, they see themselves as succeeding” (p36).

### **OTHER CONDITIONALS: SEEM, PROBABLY, MAYBE, PERHAPS, POSSIBLE**

- “They [the learners Tillie observed in Australia] seemed to have picked up the idea that people may disagree for some good reasons” (p10).
- Elderly people seem to have more time than the young and the middle-aged” (p11).
- “You probably have lots of different jobs or roles to play. Maybe you are a mother, a wife and a housekeeper, as well as a teacher. Maybe you also have certain other jobs to do in your community. ... And often the other ‘unofficial’ jobs that you do, help you to do your job as a teacher even better. We sometimes have regular times to do certain things” (p12).
- “Perhaps it would be better to integrate the different *aspects* of learning areas...” (*Ibid*).
- “Perhaps we need to think of the school curriculum in the same way” (*Ibid*).
- “... together think of some probable answers to those questions” (p15).
- “... and perhaps something which indicates why you chose this person” (p26).
- “You will probably have to allow about ten minutes for this activity” (p27 text box).
- “... and thinking of possible answers” (p32).
- “Perhaps you can think of ways to encourage them to develop the skills, and give them the understanding they seem to need” (p36).

### **CONDITIONALS COMBINED WITH WE**

- We sometimes have regular times to do certain things” (p12).
- “Perhaps we need to think of the school curriculum in the same way” (*Ibid*).
- “If we want our children to grow up into truly whole human beings ...” (*Ibid*).
- “If we want to involve our communities more in the education of the young ...” (p25).
- “If we want to see change in education ...” (p32).
- “If we focus on what learners **can** do, they see themselves as succeeding” (p36).
- “When we focus too much on what our learners **cannot** do, there is a great danger that they will see themselves as **failures**” (p36)

## APPENDIX 10 “LOOSE” QUESTIONS

- “One really wonders why we split up the school day into all those neat little 30 minute periods?” (p13).
- “While you were doing this activity, did you notice how your umKhwezeli was watching you?” (p16)
- “What would happen next in your class, if you were to adapt this activity for your learners?” (*Ibid*).
- “Tell the story to someone else before you listen to the tape. How much have you managed to remember?” (p22 )
- “Do you know any other or different versions of this story?” (p21).

## APPENDIX 11: GIVING CHOICES

- You will have to make some decisions about *how* you do this, depending on the age and stage of your learners. You will have to decide whether you wish your learners to **read** the story-beginning, or whether you wish your learners to **listen** to you telling the story-beginning (p 26).
- You can choose Option A (in which the learners will **read** the beginning of the story), or Option B (in which the learners will **listen** to you telling the beginning of the story) (p26).
- Then you need to make decisions about how much of the story you will give your learners. The idea is to give them a small part of the story, so that they have to **think** about what might follow. You want to give them just enough so that they will have questions burning in their minds. Each story will be different. You may be able to use the first two paragraphs, or you may need to use the first three. But *you* will have to decide (p27).
- You will also have to decide whether you write this story beginning on the chalkboard, or whether you make copies so that your learners can share one copy between them (p27).
- Make sure that you make time to tell them the rest of the story. Or you could give them the rest of the story for them to read themselves. Some other time, you could conduct a class discussion about the different versions (p28).
- This time you can make some choices about the story you want to use.
  - If you enjoyed researching the intsoni behind an idiom, then you could think of *another* idiom. You will then have to find the intsoni behind that saying. (In this case, we suggest that you follow the instructions in Activity 6 at the beginning of this Unit.) Or,
  - You could use the tale that you collected behind the very first idiom or saying (Activity 5, Unit 2). Or,
  - You could use the tale that Steve Tshwete told Tillie (p32).
- Once you have your story, you will have to make decisions about how much of the story to give your learners. Again, *only give the beginning* of the story (p33).

## APPENDIX 12 CONTEXTS WHICH SUGGEST THE EXPERT

- Text box: “There are different approaches to teaching and learning. Many colleges of education tend to teach just one” (p2). Sub-text, they know many approaches.
- Refers to “our global village”(p2) claiming it as theirs.
- Tillie visits schools in Australia and attends a conference in Adelaide. This account lasts two pages (p 10 and 11).
- Technical terms are added in brackets or explained in the text: non-verbal communication, project-based, fragmented (broken up), composing (making up and creating). They are often bolded or italicized.
- We remember talking to Hugh Hawes a few years ago. He was at a special workshop in Cape Town on the Child-to-Child approach to Health Education. Lots of different people were there. There were people from Early Childhood. There were people from Health Departments. There were doctors and teachers, community workers and people from youth organizations. Sub-text, they know many important people, go to important conferences; this information doesn't come out of no-where.
- Text-box: “Hugh Hawes is well known for his book “Curriculum and Reality in African Primary Schools” (1979).
- But Mr Siwisa said that the Minister of Sport, Steve Tshwete, was fond of this story, and many other stories. He said that the minister was arriving that very same day from Johannesburg, and he promised to make an arrangement so that I could meet him in King William's Town, this is Steve Tshwete's version of the story. Sub-text, they know important people. Education and story telling is important enough for ministers to take time out of their schedules.

## APPENDIX 13: SAMPLE PAGE OF LAYOUT (PAGE 26)



- At home, transcribe what you have recorded. In other words, listen to the tape, bit by bit, and write down in your Journal every word of the story that your informant told to you. **This will take a long time.** But sometimes doing research takes time. Be thorough. Don't forget to include your informant's name, and some biographical details of that person. Remember this is a degree course. Store this in your Concertina File.



- Open your Journal. Write the date and time. Then write down
  - (i) how you collected your story,
  - (ii) something about your informant (approximate age, sex, and perhaps something which indicates why you chose this person), and
  - (iii) how you found this experience.

### Using literature as a basis for introducing a whole language approach



Now you have collected your story, you will need to prepare to use it with your learners.

At the face-to-face session where this umthamo was introduced, you were given the beginning of a story that Tillie collected from Steve Tshwete. We are going to ask you to repeat this activity with your own learners. But you **won't** use the story, *Umlambo otshayela amaXoki (The River that swept away Liars)*. Instead, you will use the story that you have collected, yourself.

You will have to make some decisions about **how** you do this, depending on the age and stage of your learners. You will have to decide whether you wish your learners to **read** the story-beginning, or whether you wish your learners to **listen** to you telling the story-beginning.

The most important thing that we can say is that you **only need the beginning** of the story.

This next activity is the first part of the **Key Activity**. You can

*When some teachers tried this activity with their learners, they did different things.*

*Those who taught Grade 1 or 2, told the story beginning to their learners.*

*Some teachers were able to make enough copies of the story-beginning, so that their learners could work in pairs, and could share a copy.*

*Another teacher wrote the story beginning on the chalkboard for her learners to read.*

## APPENDIX 14: ICONS

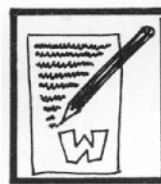
- Journal activity: structured instructions about what should go into the journal entry.
- A (female) head: this requires thinking and reflecting about.
- Written report.
- Classroom or school: this research or activity should take place in the learner-teachers' school environment.
- A key: indicates a key activity.
- A figure bowed over a book: a section for reading and thinking.
- Two figures: discussion.
- A group: a face-to-face session with umkhwezeli
- A concertina file: an assignment which should be included in the concertina file portfolio.
- A pair of scissors, pen and pritt: instructions for making materials.
- A digital time clock: the amount of time a section should take.



**Journal**



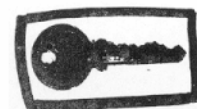
**Thinking and Reflecting**



**Written Report**



**Classroom or School**



**Key Activity**



**Reading and Thinking**



**Discussion**



**Face-to-face umkhwezeli**



**Concertina File for Portfolio**



**Making materials**

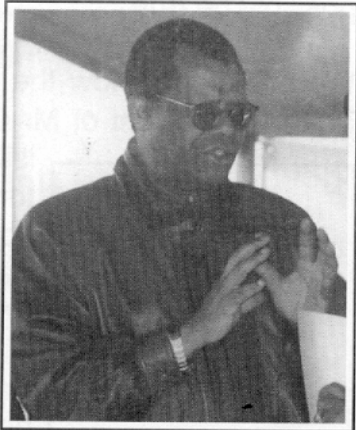
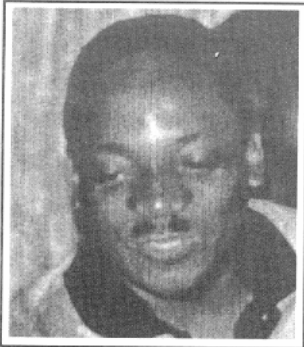


**Time**

## APPENDIX 15: RIGHT HAND TEXT BOXES

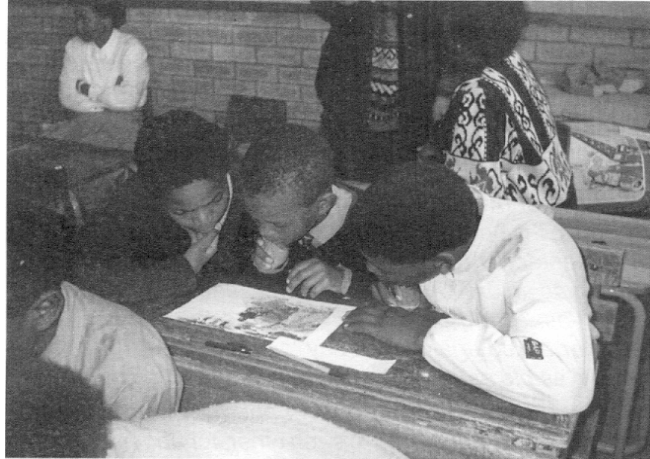
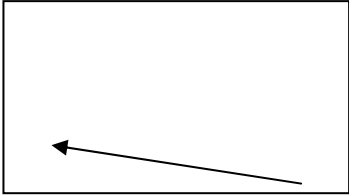
- Expand the central text: “There are different approaches to teaching and learning. Many colleges of education tend to teach just **one**” (p2).
- Explain a person introduced in the central text: “Hugh Hawes is well known for his book ‘Curriculum and Reality in African Primary Schools’ (1979)” (p12).
- Explain an instruction: “You will do this activity in the face-to-face session where this umthamo is introduced” (p14).
- Suggest some other options for classroom application: “When some teachers tried this activity with their learners, they did different things. Those who taught Grade 1 or 2, told the story beginning to their learners. Some teachers were able to make enough copies of the story-beginning, so that their learners could work in pairs, and share a copy. Another teacher wrote the story on the chalkboard for her learners to read” (p26).
- Illustrate the central text. The photograph in the right hand column, although very small, clearly illustrates the activity described in the central text as “When we tried this activity with a group of multigrade learners, the teacher read aloud the story beginning. As she modelled good reading, the learners followed in their own copies of the text” (p27).
- Provide an additional instruction about the activity: “You will probably have to allow ten minutes for this activity. You will have to read you learners’ body language to judge when they are ready. If one or two groups don’t seem to be talking very much, go to those groups and make sure that they are clear about what it is that you want them to do” (p27).
- Provide a hint: “If your school has a strict timetable, you will need to do this part of the activity in another period, or you could ask your learners to do this for homework” (p28).
- Refer to a previous umthamo: “If you look back to the first Technology Education umthamo, you will see that there is a suggestion for one way you could improvise an easel or a stand on page 23” (p29).

**APPENDIX 16: PHOTOGRAPHS OF CONTRIBUTORS TO THE INTSOMI**



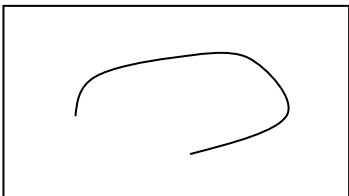
## APPENDIX 17: PHOTOGRAPHS OF LEARNERS WITH VECTORS

Photograph 1 page 13: Working together to interpret a picture



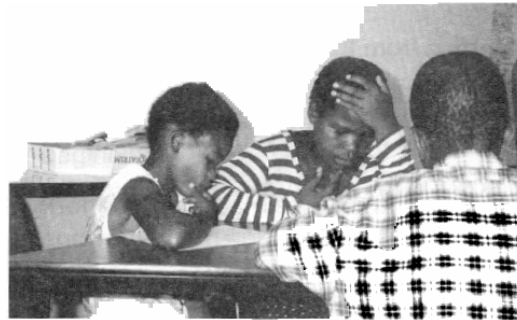
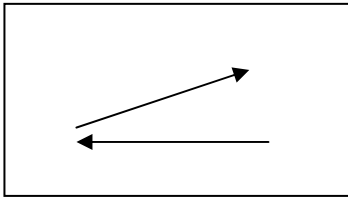
*Working together to interpret a picture*

Photograph 2 page 13: Working together on a project



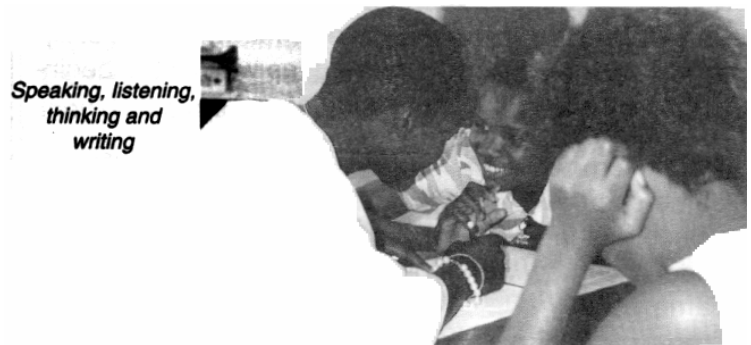
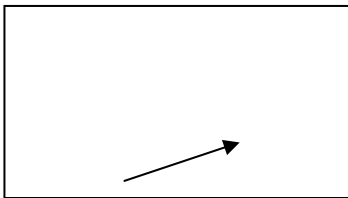
*Working together on a project*

Photograph 1 page 36: Reading and thinking



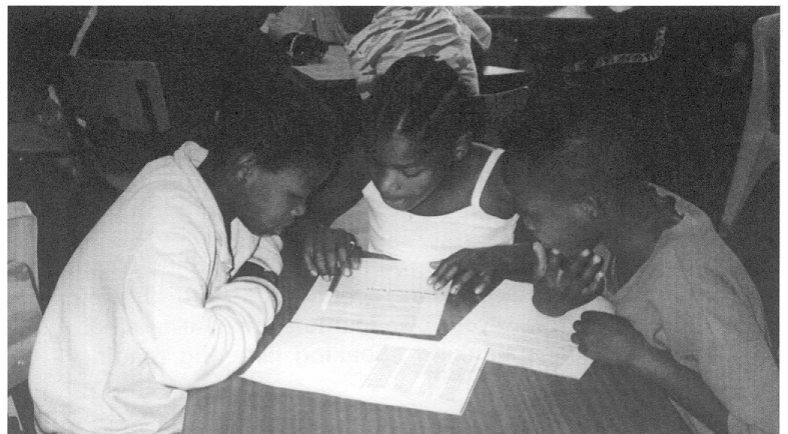
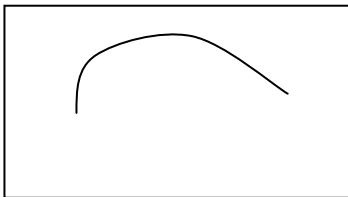
*Reading and thinking*

Photograph 2 page 36: Speaking, listening, thinking and writing



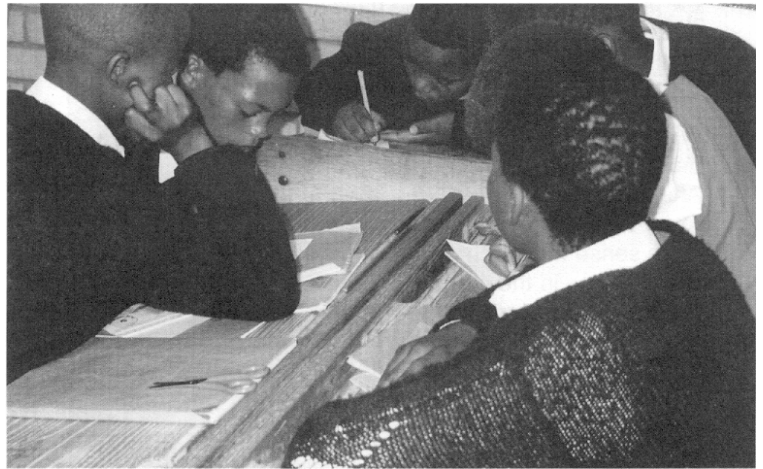
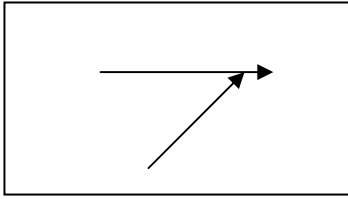
*Speaking, listening, thinking and writing*

Photograph 1 page 37: Reading, thinking and discussing



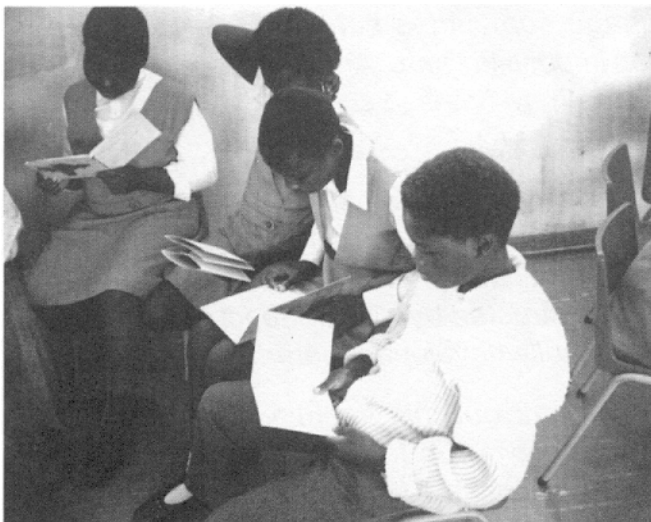
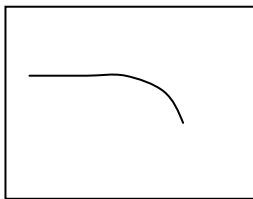
*Reading, thinking and discussing*

Photograph 2 page 37: Reading, writing and thinking

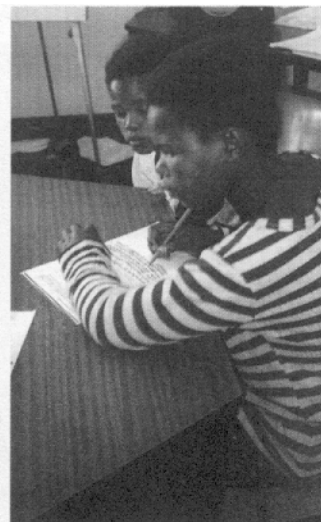


*Reading, writing and thinking*

Photograph 3 page 37: Reading and thinking about what we have written

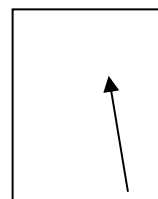


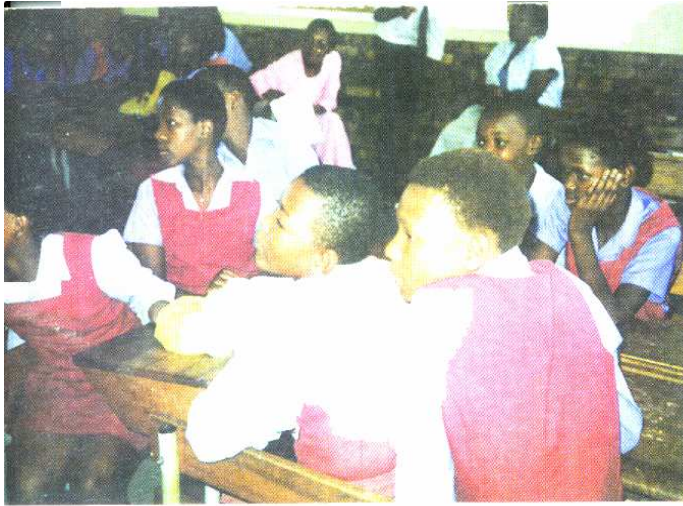
*Reading and thinking about what we've written*



*Writing, reading and thinking*

Photograph 4 page 37: Writing, reading and thinking





9

UNIVERSITY OF  
FORT HARE  
Eastern Cape Education  
Department  
*Distance  
Education Project*

*Core Learning Areas Course*

*Language, Literacy and  
Communication*

*Umthamo 2*

*A Whole Language Approach*



(Pilot Edition)

January 1999