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978-0-521-19856-1 - English Language Teaching Materials: Theory and Practice

Edited by Nigel Harwood

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## **PART A**

### **INTRODUCTION**

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# *1 Issues in materials development and design*

Nigel Harwood

This book is intended for students, teachers, teacher-trainers, and researchers in the field of ELT / TESOL with an interest in teaching materials. Drawing on Brown (1995) and Mishan (2005), *materials* is a term used here to encompass both texts and language-learning tasks: texts presented to the learner in paper-based, audio, or visual form, and / or exercises and activities built around such texts. This definition is intentionally broad in order to include locally produced handouts a teacher uses with a single class, as well as the textbooks produced by major publishing houses and distributed globally. As its title suggests, *English Language Teaching Materials: Theory and Practice* discusses materials development and design by bringing together theoretical and practical / pedagogical perspectives, and the authors in this volume describe and justify materials produced for a variety of local and international, commercial and noncommercial contexts. A wealth of research on teaching materials and textbooks can be found in a number of disciplines, including the fields of mainstream (i.e., non-TESOL) education and sociology. Whereas this introductory chapter seeks to alert readers to what I consider to be the most relevant work for TESOL researchers and professionals, informative reviews focusing on non-TESOL research include Johnsen (1993), Mikk (2000), Nicholls (2003), and Pingel (1999).<sup>1</sup>

## **Why talk about materials design?**

As Heilenman (1991), Richards (2006), and Samuda (2005) have pointed out, materials development and design is often mistakenly seen as unworthy of serious study, being “an essentially atheoretical activity” (Samuda 2005: 232). As this volume makes clear, however, materials designers draw on a wide array of theories and frameworks. Some may question the relevance of this collection to many of the teachers around the world who are restricted in

<sup>1</sup> To take one example, Mikk (2000) features an extended section on research on materials evaluation.

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the amount of materials they can produce: Time is short, teaching schedules are heavy, and practitioners are sometimes not permitted to deviate from a rigid syllabus by introducing their own materials. Yet, as Allwright (1981) argues, and even well-known textbook writers (e.g., Hutchinson & Torres 1994; O'Neill 1982) concede, no pre-prepared materials can ever meet the needs of any given class precisely; some level of adaptation will be necessary. Indeed, the commercial textbooks that teachers may be required to stick to should be seen as resources rather than courses (Bell & Gower 1998; Richards 1993), constituting a “jumping-off point for teacher and class” (O'Neill 1982: 110). Hence, as Dudley-Evans and St. John (1998: 173) claim, whereas most teachers may not be obliged to *create* materials from scratch, *providing* them in a suitable form for the local context is another matter. Dudley-Evans and St. John go on to suggest that a good provider of materials will be able to:

1. Select appropriately from what is available.
2. Be creative with what is available.
3. Modify activities to suit learners' needs.
4. Supplement by providing extra activities (and extra input).

Dudley-Evans & St. John (1998: 173)

As Samuda (2005) puts it, teachers engage in “re-design” work, “tweaking, adjusting and adapting materials to suit particular needs” (p. 235). The problem, however, is that it is sometimes assumed that all teachers are equipped with this ability to redesign as part of their “normal professional repertoire”; it is seen as something “easily picked up,” “essentially unproblematic” (p. 236). Such assumptions can be questioned – Samuda (2005) cites the case of the inexperienced teacher in Tsui's (2003) study of expertise who did not “have any principles on which to base her judgment of whether the activities [were] well designed” (p. 213). And Ball and Feiman-Nemser's (1988) impressive longitudinal study also found that novice teachers had problems using and adapting textbook materials. Hence a number of researchers agree with Samuda (2005) and Ball and Feiman-Nemser (1988) that materials design should be studied and theorized, proposing that it be incorporated into pre- and in-service teacher education programs (e.g., McGrath 2002; Richards 1993; Tomlinson 2003b). Some, like Tomlinson (2003b), place more emphasis on getting teachers to design their own materials, whereas others, like Hutchinson and Torres (1994), are more concerned with training teachers to “become better consumers of textbooks” (p. 327), but the argument that materials design should play a part in teacher education is consistent. It is anticipated that this book could be used in these education programs, and that the range of theories and sample activities in this volume

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will enhance teachers' awareness of the pedagogical options available to them. They will then need to critically evaluate how suitable these options are when (re)designing materials appropriate for their context.

**Materials and the TESOL curriculum**

In order to get a sense of the many considerations designers must take into account when writing or adapting materials, a good starting point is to consider the place of materials in the TESOL curriculum. Good overviews of theories of curriculum are provided by Brown (1995), Graves (2008), Richards (2001), and Richards and Rodgers (2001). Using Richards and Rodgers's (2001) terminology, designers will need to determine their *approach*, *design*, and *procedure*, which refer respectively to (i) approach: the nature of language and of language teaching and learning; (ii) design: the specification of content, and of the roles of teachers, learners, and materials; and (iii) procedure: the variety of pedagogical activities that can be drawn on. Materials will be shaped by these considerations. In addition, as Brown (1995) argues, it will also be necessary to evaluate the curriculum in general, and the materials in particular.

Some of the key elements associated with approach, design, and evaluation are now discussed in more detail. Materials writers will wish to consult the second-language acquisition (SLA) literature, especially when considering which language structures to focus on, and how and when to present them (see Ellis 2006). Genre-specific computer corpora, that is, electronically stored databases of authentic spoken and / or written text (see Hunston 2002; Sinclair 2004), will also be invaluable when specifying language content. Although the pros and cons of using "authentic" texts and materials (however one defines the term) are much discussed (e.g., Gilmore 2007; Lee 1995; Mishan 2005), it is fair to say that most materials writers nowadays would agree with Carter (1998) that both authentic and inauthentic texts can inform the curriculum. Despite being a corpus linguist, Carter (1998) argues that patently *inauthentic* as well as authentic texts are pedagogically exploitable (see also Shortall 2007). Rather than aiming to expose learners to how English is spoken by native speakers, these artificial texts may intentionally contain a high frequency of a particular language item to alert learners to its existence, and to provide them with practice in manipulating it. Carter (1998) also points out that authentic dialogs can be modified somewhat to make them more accessible to learners, while retaining some of the more intriguing features of naturally occurring discourse. However, just because materials are authentic, there is no guarantee learners will find

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them interesting (Prodromou 1988). There is much to be said, then, for producing materials on a local rather than a global level, connecting them meaningfully with the context and with the learners' own lives (Rossner 1988; Rubdy 2003; Tomlinson 2003a). Materials writers will therefore need to consider their purposes and priorities carefully when choosing texts and balancing the authentic against the inauthentic.

Materials writers should also consider whose authentic English is to inform the curriculum. It has often been pointed out that there are far more nonnative than native speakers of English around the world nowadays, and that nonnatives are far more likely to need to speak English with other nonnatives (e.g., Crystal 2003). The question then arises as to whether and to what extent these Englishes in the expanding circle (Kachru 1985) should be governed by those of the inner circle. Many researchers feel such considerations should be linked with international intelligibility: Those deviations by nonnative speakers that do not lead to miscommunication should be distinguished from those that do, with only the latter type pointed out by teachers (see Jenkins 1998, 2000, 2002; Seidlhofer 2005). Although a number of arguments have been put forward in favor of an English as a Lingua Franca (ELF) model (e.g., Seidlhofer 2005), Kuo (2006) and Timmis (2002) remind us that some nonnative speakers wish to sound like native speakers. Whatever variation of English is chosen, however, issues of identity loom large.

The content of the curriculum generally, and of the resulting materials in particular, is often seen as governed by "needs," although the meaning of "needs" is far from straightforward (does it refer to any or all of the learners' "lacks," "necessities," and / or "wants," to use Hutchinson and Waters's 1987 terms?). The literature is replete with discussions about whose needs materials writers should take into account (see Long 2005 and West 1994 for helpful overviews) and which instruments materials developers should use to conduct needs analyses (e.g., Jordan 1997, who lists 14 different methods). Whereas it was the language "expert" who traditionally identified needs (e.g., Munby 1978), more recent approaches have recommended that a number of parties should have a say, including teachers, education authorities, and other stakeholders (e.g., parents, sponsors), as well as the learners themselves. Writing specifically about English for Academic Purposes (EAP) contexts, Swales et al. (2001) note that although many useful insights into academic genres have been provided by corpus studies like Hyland's (e.g., 2000), many researchers question whether these findings should be unquestioningly transmitted by teachers – and unquestioningly imitated by students. The aim of such a "pragmatic" approach to needs analysis and to materials design is to identify the dominant discourse norms, and

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to ensure these norms are mastered by the students. However, Swales et al. (2001) make it clear that others believe instead that students and lecturers should “negotiate” discursal norms as part of a more equal relationship. Hence Benesch (2001) and Pennycook (1997) have introduced elements of Freireian critical pedagogy into EAP, resulting in “critical EAP” or “critical pragmatic EAP” (see Harwood & Hadley 2004). Regardless of which pedagogy is chosen, though, this will impact on how the materials construct teacher and learner roles.

Continuing to focus on teacher and learner roles, a number of researchers have stressed the need to promote learner independence. Breen and Littlejohn (2000), Clarke (1989), Littlejohn (1985), Nunan (1988), and Tudor (1996) all offer accounts of how a learner-centered curriculum can be implemented. Clarke (1989), for instance, suggests that a learner-centered approach can be fostered by getting learners to adapt materials for their own or other classes, even where materials are imposed by some official curriculum or institutional requirement. This will lead to enhanced interest on the part of learners, and a shift in their roles from “language receiver” to “collaborator”; from “assimilator” to “knower,” since by adapting or designing new tasks that focus on form, learners become “expert” in those areas and are then able to transmit their knowledge to others” (p. 135). In line with Tudor (1992), McGrath (2002) argues that learner-centeredness is a matter of degree. Whereas some of the activities he proposes feature relatively modest amounts of learner-centeredness, more radical proposals include an approach akin to learner-based teaching (Campbell & Kryszewska 1992).

With regard to the variety of pedagogical activities designers can draw on, a wide and diverse range is justified and explicated by the authors in this volume, and an overview of contents is provided at the end of this chapter. Whatever the activity selected, designers will also wish to evaluate the effectiveness of the curriculum in general and the materials in particular, and a plethora of criteria can inform evaluation checklists (see, for instance, Breen & Candlin 1987; Chambers 1997; Cunningsworth 1995; Tomlinson et al. 2001; Williams 1983; see also Mikk’s 2000 survey of the evaluation schemes used in mainstream education). As Roberts (1996) has argued, however, one of the problems with evaluation checklists is that they are all to some extent context-specific, and will therefore not be unproblematically transferrable to any given situation and set of materials; hence they “should be regarded as illustrative and suggestive only” (p. 381). There will thus be a need for what Roberts (1996) calls a “pre-evaluation phase,” during which the teacher defines his or her own context, and on this basis draws up locally appropriate criteria to be evaluated.

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Another important contribution to thinking on materials evaluation has come from Ellis (1997). Like Roberts (1996), Ellis highlights the need for *retrospective*, *empirical*, as well as *predictive* evaluations, since, no matter how systematic (predictive) checklists may appear, they will always be to some extent intuitive and subjective (Sheldon 1988). While Ellis (1997) acknowledges that most teachers informally conduct micro-evaluations (normally mentally and on the fly), there is much to be gained from formalizing the process, since the result is likely to be better thought out and more rigorous. Tomlinson (2003c) also argues for a more systematic, empirical approach to evaluation, using pre- and posttests, exams, interviews, questionnaires, learner diaries, and so on, although he acknowledges the time and expertise such a systematic approach would require. However, one of the chapters in this volume (Jones & Schmitt, Chapter 10) provides an account of empirical post-use evaluation, and other contributors discuss how their materials have been (or could be) modified as a result of classroom trialing.

I now review some of the key literature featuring an analysis of materials at the level of content. Although this literature has focused on commercial materials that are widely available, there are also useful messages here for teachers who are producing or adapting in-house materials.

### Content analysis

As Pingel (1999) explains, quantitative content analysis of materials and textbooks involves counting the number of references to a particular topic / item, or identifying content categories and calculating the percentage of space devoted to each category. In contrast, qualitative content analysis is more overtly interpretive, seeking to uncover meanings and values transmitted by the materials. De Posada (1999) argues that content analyses can show materials writers' "pedagogical, psychological, and epistemological positions" (p. 425), as well as revealing "cultural patterns" and "the focus of societal attention" (Wasburn 1997: 473), since materials are at some level representative of the world in which they originate. In TESOL, then, content analysis of textbooks / materials normally focuses on the language taught or the thematic content, and both types of study are now reviewed, before the limitations of this body of work are discussed.

#### (a) Linguistic content analyses

Researchers have wondered for some time how closely the language textbooks teach matches the language speakers and writers use (e.g.,

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Ewer & Boys 1981). Sheldon (1988) judged that commercial materials writers selected and presented vocabulary “without system” and without consulting sources like West’s (1953) service list. It seemed “a closed circle” was in operation,

... wherein textbooks merely grow from and imitate other textbooks and do not admit the winds of change from research, methodological experimentation, or classroom feedback. (Sheldon 1988: 239)

The compilation of corpora in recent years has provided us with databases of authentic language use, making it possible to investigate this issue systematically, and the results are not encouraging: It would seem that much of the language taught in commercial materials differs markedly from the language that is actually used in spoken and written discourse. Some of what follows draws on Gilmore’s (2007) useful review, and whereas all of the content analyses discussed here are preoccupied with language, I draw a (convenient but artificial) distinction between those focusing on language, pragmatics, and genre.

## (I) LANGUAGE

A number of corpus-based studies have identified a linguistic gap between commercial materials and actual language use. Hence ELT textbooks misrepresent the range of modal language (Holmes 1988; Hyland 1994; McEnery & Kifle 2002; Römer 2004) and reported speech (Barbieri & Eckhardt 2007) found in native speaker corpora, and textbooks’ treatment of the linking adverbial *though* (Conrad 2004) and the present continuous tense (Römer 2005) comes up short. Carter (1998), Cullen and Kuo (2007), and McCarthy and Carter (1995) show how corpora distinguish spoken and written grammar, suggesting that standard grammars and materials that are not informed by corpus data fail to account for some pervasive spoken discourse features (such as ellipsis and vague language). A number of studies, including Jones (1997) and Levis (1999), have also highlighted the unsatisfactory treatment of pronunciation in textbooks, and research in other areas (such as textbooks’ treatment of formulaic language) is ongoing (see Gouverneur 2008).

## (II) PRAGMATICS

It is difficult for language learners to achieve pragmalinguistic competence, as Bardovi-Harlig et al. (1991) argue, because speech acts are not easily transferred from one language to another (see also Rose & Kasper



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2001; Thornbury & Slade 2006); however, “[s]peakers who do not use pragmatically appropriate language run the risk of appearing uncooperative at the least, or, more seriously, rude or insulting” (p. 4). For instance, Bardovi-Harlig et al. (1991) point out that the way conversations are closed varies from culture to culture, with some cultures having minimal closing requirements, and others (including American and British) having far more elaborate ones. Their study of ELT textbooks’ treatment of closing conversations finds the advice given wanting. Chan (2009b) and Jiang (2006) found shortcomings in textbooks’ coverage of suggestions, and Boxer and Pickering (1995) found advice on the language of complaints similarly inadequate. This shows, Boxer and Pickering believe, that textbook dialogs “are not based on spontaneously occurring conversations but rather on authors’ intuitions” (p. 47). Hence,

... many ELT texts ... continue to concentrate on the acquisition of linguistic competence, with insufficient attention to a fuller communicative competence.

(Boxer & Pickering 1995: 52)

## (III) GENRE

Several studies have compared textbooks’ language syllabi in specific genres with real-life data in the realms of academic and business discourse. Williams (1988) and Chan (2009a), for instance, contrast the language that features in textbooks with that in real-life business meetings. Candlin et al. (2002) focus on legal English materials. In trying to locate suitable legal writing materials for Hong Kong EAP learners, they found that, of the 56 books available, “[f]ew, if any, are premised on any type of research-based linguistic analysis of legal texts and language” (p. 300). Finally, Paltridge (2002), in common with Harwood (2005b) and Hyland (1994, 1998), finds that textbooks offering advice to EAP students on writing often do so anecdotally (that is, “[f]ew ... include an examination of actual texts” [p. 126]), and that such advice as is presented is incomplete.

*(b) Cultural content analyses*

As well as being carriers of linguistic content, materials have also been seen as cultural artifacts because of their thematic content (e.g., Apple 1984; Liu 2005; Luke 1988). One example of a cultural content analysis was conducted by Shardakova and Pavlenko (2004), who object to the construction of the target culture in two Russian language textbooks. In

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one of the books, women are reportedly depicted “as less socially engaged, situated predominantly in the family domain” (p. 36), despite the fact that the majority of women in Russia work outside the home. Both books stereotype women as being preoccupied with romantic relationships, whereas men are more concerned with their careers (see also Porreca 1984, who found gender stereotyping in TESOL textbooks). Both books also (inaccurately) portray Russia as an ethnically homogeneous society, and one of the books is said to present students with a crudely stereotypical view of Russian society by informing readers that many Russian businessmen “clearly have connections with organized crime” (p. 34). Another well-known study of the cultural messages transmitted by language textbooks is Canagarajah (1993a), who argues that the (U.S.) textbook he used in Sri Lanka presented his Tamil learners with an alien, consumerist culture:

... the situations represented – such as commuting frequently by air, performing instant cooking, or doing department store shopping – assume an urbanised, Western culture that is foreign to the rural, “third world” students. (p. 147)

It should be noted, however, that a more recent article by Gray (2002) suggests that ELT publishers are concerned with eliminating any content that may offend teachers or learners. Gray (2002) illustrates this by showing how women occupy positions of power in a bestselling UK textbook, and men are shown “in situations where they wear aprons, prepare meals for their female partners, and talk knowledgeably about housework” (p. 159). Gray (2002) explains how some ELT publishers rely on the acronym PARSNIP (politics, alcohol, religion, sex, narcotics, -isms, and pork) to determine the subject matter best avoided (p. 159). However, he argues that the downside of all of this is that textbooks can become “bland” and “begin to look very much alike” as materials writers opt for the same “safe” topics (p. 159).

*(c) The limitations of content analysis*

Both quantitative and qualitative forms of content analysis have been critiqued (e.g., Johnsen 1993). The former is guilty of “enabl[ing] breadth at the expense of depth” (Nicholls 2003), revealing which aspects of language, culture, and content feature heavily in the materials, but telling us little about how these aspects are presented. The latter approach, unless conducted rigorously and systematically, suffers from reliability issues. For instance, it is noticeable that neither Canagarajah (1993a) nor Shardakova and Pavlenko (2004) include any mention of inter-rater reliability testing of their analyses. Qualitative content analysis may also be felt to lack