

APPENDIX A: THE ELON STATEMENT ON WRITING TRANSFER

Developed by 45 writing researchers participating in the 2011–2013 Elon University Research Seminar (ERS) on Critical Transitions: Writing and the Question of Transfer, this statement summarizes and synthesizes the seminar’s meta-level discussions about writing and transfer, not as an end-point, but in an effort to provide a framework for *continued* inquiry and theory-building. As part of the seminar, ERS facilitated international, multi-institutional research about writing transfer and fostered discussions about recognizing, identifying enabling practices for, and developing working principles about writing transfer.

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TERMS

For many scholars “transfer” accurately describes the phenomenon of using prior knowledge in a routinized way and functions as an umbrella term, connecting Writing Studies research to other multi-disciplinary inquiries about transfer of learning. Yet many consider “transfer” inadequate for describing the phenomenon of using prior knowledge in new ways that entail change, transformation, repurposing, and expansive learning. As a result of continued inquiry into these dimensions, scholars have embraced a number of terms that highlight varied theoretical and research-informed connections to discuss this intersection of prior knowledge and movement sometimes referred to simply as transfer. But to advance disciplinary understanding of “writing transfer” (used as a collective, umbrella term throughout this statement), scholars need to qualify the word “transfer,” unless we mean transfer in a routinized sense, and reach some consensus about how related, descriptive terms are used in this line of inquiry.

Towards that end, the following list and graphic include terms used in writing transfer research and definitions of those terms from the transfer and writing transfer literature. This list is not exhaustive. Continuing work in writing transfer should explicitly reconcile new terms—and new usage of existing terms—with the scholarship’s existing vocabulary:

TRANSFER

“Transfer refers to how previous learning influences current and future learning, and how past or current learning is applied or adapted to similar or novel situations. Transfer, then, isn’t so much an instructional and learning technique as a way of thinking, perceiving, and processing information” (Haskell, 2001, p. 23). Haskell further offers a taxonomy for transfer, with six levels of transfer (i.e., non-specific, application, context, near, far, and displacement or creative) and fourteen interrelated kinds of transfer (i.e., content-to-content, procedural-to-procedural, declarative-to-procedural, procedural-to-declarative, strategic, conditional, theoretical, general or nonspecific, literal, vertical, lateral, reverse, proportional, and relational). This taxonomy borrows from other definitions, including David Perkins and Gavriel Salomon’s concepts of near transfer and far transfer:

- “Near transfer occurs when knowledge or skill is used in situations very like the initial context of learning” (Perkins & Salomon, 1992, p. 202).
- “Far transfer occurs when people make connections to contexts that intuitively seem vastly different from the context of learning” (Perkins & Salomon, 1992, p. 202).

HIGH ROAD AND LOW ROAD TRANSFER

Perkins and Salomon (1988, 1992) also distinguish between high road and low road transfer. In low road transfer, similarities between a new context and prior situations trigger extensively practiced (near automaticity) skills. In contrast, high road transfer requires mindful abstraction of principles to apply them in new situations.

GENERALIZATION AND CONSEQUENTIAL TRANSITIONS

King Beach (2003) examines generalization as knowledge propagation, suggesting that generalization is informed by social organization and acknowledges change by both the individual and the organization. “Transition . . . is the concept we use to understand how knowledge is generalized, or propagated, across social space and time. A transition is *consequential* when it is consciously reflected on, struggled with, and shifts the individual’s sense of self or social position. Thus, consequential transitions link identity with knowledge propagation” (Beach, 2003, p. 42).

BOUNDARY-CROSSING

Terttu Tuomi-Gröhn and Yrjö Engeström write that boundary-crossing “involves encountering difference, entering into territory in which we are unfa-

miliar and, to some significant extent therefore, unqualified. In the face of such obstacles, boundary-crossing seems to require significant cognitive retooling” (2003, p. 4). Boundary-crossers employ “boundary objects,” tools that develop at the intersections of communities/activity systems to facilitate interaction between and across systems.

REMIX AND REPURPOSE

Kathleen Blake Yancey suggests that “remix—the combining of ideas, narratives, sources—is a *classical means of invention*. . . . Remixing, both a practice and a set of material practices, is connected to the creation of new texts” (2009, p. 5–6). In studies of writing and transfer, remix and repurpose often are used to describe writers’ process of conscious reflection on prior knowledge and adaptation of it for new contexts and purposes.

INTEGRATION

Successful integration refers to “an act of transfer that assumes some degree of metacognitive awareness and a positive outcome for the student” representative of high road transfer, dialogized consciousness, and expansive learning (Nowacek, 2011, pp. 33–34). Rebecca Nowacek cautions that students also can experience frustrated integration, though, when despite “meta-aware seeing,” students’ outcomes are unsuccessful.

LEARNING AND TRANSFER THEORIES

In addition to drawing from writing studies theories, writing transfer inquiry integrates a range of broader learning and transfer theories (e.g., affinity spaces, affordances, genre theory, information literacy studies, zone of proximal development, etc.) by a variety of scholars (e.g., Bourdieu, Engeström, Gee, Vygotsky, Wenger, etc.). The following theories and concepts have been especially prevalent in ERS studies as frameworks for studying and describing the complex dynamics of writing transfer:

BIOECOLOGICAL MODELS AND DISPOSITIONS

Like cultural-historical activity theory, the Bioecological Model of Human Development developed by Urie Bronfenbrenner and colleagues attends to the context of learner development (see, for instance, Bronfenbrenner & Morris, 2006). Their work extends the focus on the individual in the system to consider the

impact of the individual's interactions with his/her context over time. Applied to transfer studies, the bioecological model suggests that learner's dispositions can impact willingness to engage with transfer and can have generative or disruptive impacts on the learner's context.

COMMUNITIES OF PRACTICE

Etienne Wenger and others suggest that communities of practice are collectives of individuals and groups sharing values, goals, and interests (see, for instance, Wenger, McDermott & Snyder, 2002). Communities include both novices and experts. Part of the dialogic process of moving from novice to expert involves learning how to learn within communities. As we think about learning transfer, then, we should look for the enabling practices that help students develop those learning-how-to-learn strategies that apply across contexts or communities.

CULTURAL-HISTORICAL ACTIVITY THEORY (CHAT)

As the Center for Research on Activity, Development, and Learning explains, cultural-historical activity theory builds from the concept that "A human individual never reacts directly (or merely with inborn reflects) to environment. The relationship between human agent and objects of environment is mediated by cultural means, tools and signs." Students routinely move among activity systems (including curricular, co-curricular, and extra-curricular contexts), and language functions as one of their mediating tools, but they must learn how to adapt their use of the tool to each activity system. Meanwhile, students also change the contexts as they interact with, resist, and renegotiate each activity system.

THRESHOLD CONCEPTS

Jan (Erik) Meyer and Ray Land (2006), building on David Perkins' notion of *troublesome knowledge*, challenge educators to identify concepts central to epistemological participation in disciplines and interdisciplines, "transformed way[s] of understanding" that function as a "portal, opening up a new and previously inaccessible way of thinking about something" (2006, p. 3). Once educators identify threshold concepts that are central to meaning making in their fields, as the contributors to *Naming What We Know* have done for writing studies, they can prioritize teaching these concepts, in turn increasing the likelihood that students will carry an understanding of these core concepts into future coursework and contexts.

Figure A.1 illustrates how these learning and transfer theories examine intersections among knowledge, learners, and contexts.

What does the concept/idea emphasize?

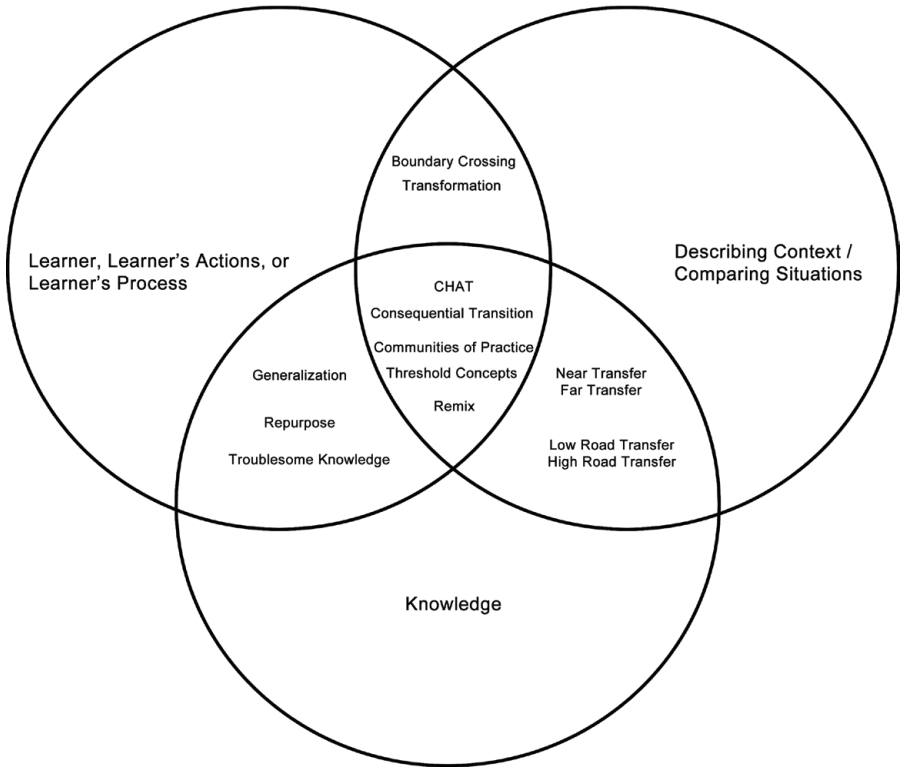


Figure A.1. What the learning and transfer theories emphasize.

WORKING PRINCIPLES ABOUT WRITING TRANSFER

Drawing on their own research and that of others, ERS participants have identified a number of principles in which they have high confidence—that is, principles that emerge out of empirical studies focusing on writing transfer. These principles extend from the idea that transfer does occur, contrary to suggestions reflected in some prior research. Writers consistently draw on prior knowledge in order to navigate within and among various contexts for writing and learning. Sometimes the rhetorical challenge requires bringing what we know to conscious attention in order to think about similarities and differences between what we know and have done and what we must do now. Sometimes we must reflect, repurpose, and generalize what we bring to bear. Sometimes we must do even more than repurpose and must engage in consequential transitions (Beach,

2003; see above). And usually, even while we are bringing existing knowledge and experience to bear on the new situation, we must learn anew as part of the process of understanding, adaptation, and enculturation.

Nevertheless, while we know that writing transfer both occurs and is necessary for successful writing, prior research highlights the challenges of teaching to facilitate transfer. Students typically do not expect to be able to apply what they are learning in traditional first-year writing courses to other contexts (e.g., Bergmann & Zepernick, 2007; Driscoll, 2011), and when they do try to transfer new skills and knowledge from one academic setting to another, they often encounter roadblocks (e.g., Nelms & Dively, 2007; Nowacek, 2011). Furthermore, some curricular designs unintentionally impede transfer (e.g., Wardle, 2009).

As teachers, then, we must consider what sorts of rhetorical challenges students encounter in our classes and contexts beyond and how to best help students navigate those challenges. Research suggests that there are things that teachers can do to afford learning in these moments of challenge. In other words, it is possible to “teach for transfer” (as Perkins and Salomon put it), and the discipline is learning more about what writing transfer entails:

- Writing transfer is the phenomenon in which new and unfamiliar writing tasks are approached through the application, remixing, or integration of previous knowledge, skills, strategies, and dispositions.
- Any social context provides affordances and constraints that impact use of prior knowledge, skills, strategies, and dispositions, and writing transfer successes and challenges cannot be understood outside of learners’ social-cultural spaces.
- Prior knowledge is a complex construct that can benefit or hinder writing transfer. Yet understanding and exploring that complexity is central to investigating transfer.
- Individual dispositions and individual identity play key roles in transfer.
- Individuals may engage in both routinized and transformative (adaptive, integrated, repurposed, expansive) forms of transfer when they draw on or utilize prior knowledge and learning, whether crossing concurrent contexts or sequential contexts.
- Successful writing transfer occurs when a writer can transform rhetorical knowledge and rhetorical awareness into performance. Students facing a new and difficult rhetorical task draw on previous knowledge and strategies, and when they do that, they must transform or repurpose that prior knowledge, if only slightly.

- Students’ meta-awareness often plays a key role in transfer, and reflective writing promotes preparation for transfer and transfer-focused thinking.
- The importance of meta-cognition of available identities, situational awareness, audience awareness, etc., become even more critical in writing transfer between languages because of the need to negotiate language-based differences and to develop awareness about the ways language operates in written communication in each language.

ENABLING PRACTICES

Practices that promote writing transfer include:

- Constructing writing curricula and classes that focus on study of and practice with concepts that enable students to analyze expectations for writing and learning within specific contexts. These include rhetorically-based concepts (such as genre, purpose, and audience);
- Asking students to engage in activities that foster the development of metacognitive awareness, including asking good questions about writing situations and developing heuristics for analyzing unfamiliar writing situations; and
- Explicitly modeling transfer-focused thinking and the application of metacognitive awareness as a conscious and explicit part of a process of learning.

ERS participants have investigated both “Teaching for Transfer” and “Writing about Writing” curricula in multi-institutional studies. Because these types of curricular approaches forefront rhetorical knowledge, terms, and concepts that students will need to apply in future contexts, they equip students with tools and strategies for successful boundary crossing. These approaches typically also build in reiterative opportunities for developing metacognitive awareness. Although these curricula often are implemented in first-year writing contexts, courses university-wide can include reflection activities about both generalizable and discipline-specific writing strategies.

RECOGNIZING AND STUDYING TRANSFER: SITES AND METHODS

Cross-institutional, cross-disciplinary, and cross-cultural collaboration enriches the discussion about writing transfer and allows new perspectives to become

visible. Even if multi-institutional research is not feasible for a specific writing transfer study, scholars should pursue both new and replication studies in varied contexts and routinely revisit how new inquiries intersect with prior and concurrent studies.

Both in case studies of individuals or contexts and in larger data samples, writing transfer studies use a variety of qualitative and quantitative methods to identify evidence of and measure transfer, including surveys, focus groups, interviews, classroom observations, text analysis, discourse analysis, composing-aloud and think-aloud protocols, group discussion logs, and analysis of students' course work and faculty comments. While students often are the primary participants in transfer studies, researchers also interact with and collect data from teachers and community partners, and new studies are beginning to investigate transfer in experienced writers (e.g., Anson, in press; see also Smart, 2000). Most transfer studies are short-term (one or two terms), but additional longitudinal studies and studies that examine both writers' academic and non-academic activity systems could extend the field's understanding of writing transfer.

ERS studies and other contemporary work in writing transfer reiterate the value of using mixed methods across multiple contexts to achieve a "scalable" understanding of writing transfer—enabling teacher-scholars both to focus in detail on specific communities of practice and activity systems *and* to "zoom out" to examine working principles of writing transfer that apply across multiple contexts. For this reason, both short-term and longitudinal studies will enrich disciplinary understandings of transfer, particularly as scholars examine learners' development as writers, not merely their transitions from one context to another. Adding student voices as participants, or even as co-inquirers, facilitates this more holistic examination of learners' development, boundary-crossing, re-mixing, and integration.

WORKING PRINCIPLES IN DEVELOPMENT

In addition to the high-confidence working principles discussed above, ERS participants identified a number of working principles that remain in development. ERS participants have moderate to high confidence in these in-development principles, but they merit further research.

- With explicit rhetorical education, students are more likely to transform rhetorical awareness into performance.
- Helping students develop strategies and tools to think about how writing functions in communities can potentially prepare them to draw effectively on prior knowledge when they encounter writing in

new settings, whether writing for a major, writing in a workplace, or writing for extracurricular activities.

- Some dispositions seem to better afford engaged rhetorical problem-solving. We are only starting to explore what such dispositions might be, so pedagogy that promotes transfer needs to be attentive to dispositions research.
- Some physical and digital space designs afford learning and transfer better than others.
- The transfer of rhetorical knowledge and strategies between self-sponsored and academic writing can be encouraged by designing academic writing opportunities with authentic audiences and purposes and by asking students to engage in meta-cognition.

NEXT STEPS AND IMPLICATIONS

Clearly these principles—when paired with supporting research and evidence—have implications for first-year writing programs, writing across the curriculum programs, writing majors, general education curricula, and higher education more broadly. Updates to the ERS projects and any subsequent revisions to this statement will be posted at <http://www.centerforengagedlearning.org/elon-statement-on-writing-transfer/>.

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