Journal of the Simplified Spelling Society J28, 2000/2.

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[Chris Upward: see **Journals**, **Newsletters**, **Pamflet**, **Leaflets**, **Media**, **Book and Papers**.]

1. Editorial

Christopher Upward

Enduring significance of the i.t.a.

The year 2000 marks the fortieth anniversary of the launch of the Initial Teaching Alphabet (i.t.a.), the greatest' spelling reform' ever implemented in English — though none of those involved saw it as such. This number of *JSSS* acknowledges the importance of the i.t.a. with its first two items, which both, in different ways, originated with John Downing. For it was he who led the Reading Research Unit at London University which conducted the i.t.a. experiment from 1960 to 1967, and who as President of the SSS from 1972 to 1987 gave the address we reprint in Item 2.

That address, *The Transfer of Skills in Language Functions*, though it highlights key findings of the i.t.a. experiment, ranges far more widely across the question of what goes on in readers' minds when they transfer reading skills already achieved in one writing system to an unfamiliar system. For that is what we are asking people to do when we call for a mature orthography such as that of English to be replaced by another, whether that is altered only slightly or quite radically. Downing's extensive experience of literacy acquisition in different languages and cultures illuminates this issue in a humane and tolerant manner, setting out the broader psychological context in which the whole enterprise of spelling reform has to be conceived.

The summary of Downing's formal evaluation of the i.t.a. (Item 4) is partly of historical interest (spelling reformers do need to know what happened), but it also contains many practical implications for the design of future reform proposals. The most quotable finding of the experiment is that it further confirms the conclusion of more recent comparisons between languages (see ***JSSS* 27**, Item 12), that the irregularity of English spelling seriously hinders the process of literacy acquisition. Perhaps the strongest warning we can take from the i.t.a. experiment is that there is no evidence that the special i.t.a. characters benefited learners. Indeed, they rather prejudiced the long-term viability of the i.t.a., which would have entailed fewer problems of all kinds if it had been merely an 'i.t.o.', ie, an initial teaching orthography using only letters of the Roman alphabet.

With hindsight, we may perhaps feel that the SSS was right to keep its distance from the i.t.a. 40 years ago. The i.t.a. was a bold experiment, launched almost at the whim of a man (Sir James Pitman) of enormous energy, influence and resources. Fortunately it was directed by a man (John Downing) of cool scientific judgment who, in his evaluation, was not afraid to point out its weaknesses and to suggest sounder, if more modest, alternatives which, unlike the i.t.a., could be compatible with a real spelling reform.

Other features of this issue

Several articles in this issue are concerned with phonics, explicitly in the contributions from Jolly (Item 5) and Groff (Item 6), and implicitly à propos of the i.t.a. One of the chief obstacles to spelling reform in the English-speaking world is the lack of public understanding of the psychology of the alphabet — how easily and naturally the human brain masters patterns of regular sound-symbol correspondence, and how profoundly it is confused by the present spelling. This lack of understanding has also inhibited the use of phonics in literacy teaching in English where it is now proved to offer the most effective learning method despite irregular spelling. Phonics and spelling reform are based on the same psycho-alphabetic principle, and every advance in the use of phonics may be seen as preparing the ground intellectually for spelling reform. Spelling reformers therefore have an interest in the widest possible use of phonics, which shows up the hazards of the system where more slapdash approaches to literacy, such as ' look-and-say', skate over them.

Seen from Europe, Portuguese may seem marginal, but in a world perspective it is an important language, spoken in four continents. Zé do Rock's account of its spelling (Item 9) reveals an important parallel with English: that there are marked differences between its European and American versions (ie, between Portugal and Brazil). Similar differences between British and American English are sometimes cited as obstacles to the reform of English spelling; but the repeated small reforms that have been (sometimes rather erratically) agreed between the spelling authorities in Portugal and Brazil at intervals through the 20th century show that, given the will, the Atlantic need be no barrier to the co-ordinated improvement of the spelling of a world language. We may also note how a letter may be written as pronounced in one accent, but omitted when silent in the other (cf, *secret(a)ry, fert(i)le* in different accents of English).

Allan Campbell's collected campaign documentation from New Zealand (Item 10) suggests what might possibly prove the most promising location for a first step toward spelling reform: a country small enough and new enough for personal contacts to count and for institutions to be open to the arguments of individuals. He sketches a scenario where New Zealand, unencumbered by vast, arthritic political structures, might be willing to throw down the gauntlet to the rest of the English-speaking world with a challenge to orthographic action. Allan deserves the SSS's wholehearted support for his undertaking. His documentation also merits careful study for the lessons it may suggest for campaigning elsewhere.

[Journal of the Simplified Spelling Society, 28, 2000/2 pp3–11 in the print version]
[John Downing: see **Bulletins**, **Anthology**, **Journals**, **Newsletters**]

2. The Transfer of Skill in Language Functions

John Downing

We here present a re-edited version of John Downing's talk to the SSS on 6 September 1986. Then Professor of Educational Foundations in Reading at the U. of Victoria, British Columbia, in the 1960s he had directed the research into the effectiveness of the Initial Teaching Alphabet at the London Institute of Education. His copious writing on reading psychology culminated in *Psychology of Reading* (Downing & Che Kan Leong, 1982). Succeeding Sir James Pitman in 1972, he was President of the SSS until his death in 1987. For the first version of this paper, see ***JSSS 1987/2*** (Item 4); for a tribute to John Downing's life and work see ***JSSS 1987/3***, (Item 3).

0 Abstract

§1 outlines the phases of skill acquisition, whether applied to literacy or any other skill.
§2 describes how easily literacy in one script is transferred to a different script.
§3 gives statistics for the improved literacy of children taught their first literacy skills in the regularly spelt Initial Teaching Alphabet (i.t.a.) compared to the irregularity of traditional English orthography (TO).
§4 shows how the same effect of transfer operates between different languages, notably the languages of New Guinea, where, however, the involvement of English seriously disrupts otherwise straightforward processes of literacy acquisition.
§5 sketches the different modalities of transfer in Russian, Chinese, Japanese.
§6 demonstrates the advantages of learning that proceeds from what is already known; literacy is thus best acquired first of all in the mother tongue, and using a regular orthography, which trains the mind in accurate, logical observation.
§7 discusses the risks of negative transfer arising from poorly thought-out learning sequences, and emphasizes the need for experiment to test innovations.
A range of further issues is touched on as discussion points at the end.

§1 The acquisition of skills, including literacy
My subject is the psychological question of transfer from one spelling system to another, and I have entitled my talk 'The Transfer of Skill in Language Functions'. I shall discuss it under two main headings, firstly the psychology of skill, and secondly, how to maximize positive transfer of skill. In *Psychology of Reading* we say a lot about skill, some of it relevant to orthography.

There are four main language skills, which overlap with each other: speaking, listening, reading and writing. (Other language skills are perhaps better regarded as subskills.) The four don't necessarily come in that particular order, but speaking and listening are early skills, and reading and writing are later skills.

A short definition of a skill, based on generally held views on skills in psychology and covering all the main aspects, is as follows: a skill is a complex integration of habits (in psychology we use the word habit not in its everyday meaning of bad or good habits, but meaning a small piece of learning), including cognitive, attitudinal, evaluative and motor behaviours. The most important word in the definition is integration: psychologically it is the most important feature of a skill, which is made up of numerous subskills, and the performance of the skill involves the integration of all of them by the brain.

We need to recognize the different kinds of behaviour involved in a skill. There is obviously the cognitive aspect, which means the acquisition and use of knowledge. Less obvious, though extremely important, is the attitudinal aspect, which we recognize perhaps more for instance in sporting skills: in playing soccer you need not only to know how to play, but also to have the right kinds of attitude towards the sport; and in reading and writing too you need the right kinds of attitude towards those skills in order to perform well. The evaluative aspect means you have to be able to evaluate your own performance, to know whether you're performing well or not. And then there are motor behaviors, which are obvious in some skills like playing soccer or driving a car, but which are also important in all the language skills I have mentioned: in speaking, perhaps rather less in listening, but certainly in reading and writing. Eye movements, for instance, are extremely important motor behaviors in reading.

This kind of definition relates to any skill. For instance Whiting at the Free University of Amsterdam would use the same definition in his area, which is physical skills like sports and physical education. For our book *Psychology of Reading* we first of all considered what psychologists have written about skills in general, and made a list of about 20 features. Then we examined the behavior that goes on in reading to see whether it has those features — and it does. We were able to say, if reading is a skill, we should be able to take all the knowledge and research results we have in psychology concerning skills and apply them to the teaching of reading and writing. That's quite an important part of the book: we were able to apply a lot of research in psychology which had not yet been applied to the teaching of reading and writing.

Something that was discovered a few years ago in experimental psychology is that any kind of skill passes through three learning phases. The *cognitive* phase is where learners figure out what they are supposed to do, how they are to understand the task — whether learning to jump, or learning to read or drive a car. The second phase is then to *practise* the skill until it can be performed perfectly. And the final phase in achieving highly skilled performance is becoming *automatic*, so you don't have to think about it any more, except when something unusual occurs.

Of course a skill like reading or flying a plane is not just three phases. Those phases occur over and over again, because a complex skill has many parts, which are called subskills, and you have to go through these phases every time you face up to a new subskill. Also there is no neat frontier or boundary between the phases, you can't just draw a line between phases in terms of actual human behavior, they blend into each other. In other words, a phase is an abstraction. So in the cognitive phase you may think you've figured out what to do, and start practising away, and then you discover you've not got quite the right idea, and you have to modify your idea of what to do.

Now from our point of view in the Simplified Spelling Society another very important thing is that we know from research that once a skill has become automatic, it's never lost — unless there is brain damage or something like that. Once normal humans have acquired the skill at the automaticity level, it's permanent. We can confirm that from our own experience: I became a skilled bicycle rider as a child and went on bicycling for many years as an adult, but I stopped doing so long before I emigrated to Canada in the late 1960s; but after I'd been there about 10 years, I bought a bicycle, and just got on and rode. I never had to think about the skill because it was so automatic that I hadn't forgotten anything. Similarly, I shall be working in France now for six months, and all my French language behavior will come back, although I haven't used it for some time. There's no problem once a skill is automatic.

Another psychologically important feature of skill is that, once it is automatic, it readily transfers from one particular subject or situation to another. Consider the skill of driving a car: I travel a lot, and very often I land at an airport and rent a car, but I don't know what sort of car I'm going to get; in that situation, all you have to do is find out where the controls are, which is sometimes a little difficult, but once you've located them, it doesn't take very long before your automaticity returns. That's very important for us because of what it tells us about the timing of transition. If you're going to simplify English spelling, there must be automaticity if you're going to get ready transfer from one spelling to another.

§2 Transfer of reading skills

We found the same in the research into children's use of the Initial Teaching Alphabet (i.t.a.). Fergus McBride did a special study in Edinburgh of the transition from i.t.a. to traditional orthography (TO) and found that transition only took place with ease if the child was already reading very fluently in the i.t.a. The details are given in my book *Evaluating the Initial Teaching Alphabet* (Downing, 1967), which contains a lot of information relevant to the Simplified Spelling Society's work. If you look up Fergus McBride in the index, you'll find out what page the study is on. Unfortunately the book is difficult to find, but there will be some in libraries.

If we look at the first folio edition of *Hamlet* (1623), we don't have much difficulty reading it, though of course we are helped if we know the text well. It uses an older spelling of English, and if you have no experience of reading it, what slows you down at first is the S that looks like an *f*, and there is the confusion of U and V. When this was printed there wasn't consistent spelling, and there was a lot of freedom.

Or consider the test which Sir James Pitman made up, where you have to read words written with the spelling reversed and each letter in its mirror-image form. Once you know there's one rule underlying the text, you can read it. Most people can read words written backwards or upside-down.

The following appeared in *Punch* (Herbert, 1920):

A CRIMINAL TYPE

> To-day I am MAKing aN inno6£vation. as you mayalready have gassed, I am typlng this article myself Zz1/2 Instead of writing it, The idea is to save time and exvBKpense, also to demonstyap demonBTrike= =damn, to demonstratO that I can type /ust as well as any blessedgirl if I give my mInd to iT'" Typlng while you compose is realy extraoraordinarrily easy, though composing whilr you typE is more difficult. I rather think my typing style is going to be different froM my u6sual style, but Idaresay noone will mind that much. looking back i see that we made rather a hash of that awfuul wurd extraorordinnaryk? in the middle of a woRd like thaton N-e gets quite lost? 2hy do I keep putting questionmarks instead of fulstopSI wonder. Now you see i have put a fulllstop instead Of a question mark it nevvvver reins but it loours.

These examples show that despite the strange orthography none of us has difficulty in transferring because we've reached the automatic level of skill which allows ready transfer.

§3 Statistics on i.t.a.–TO transfer

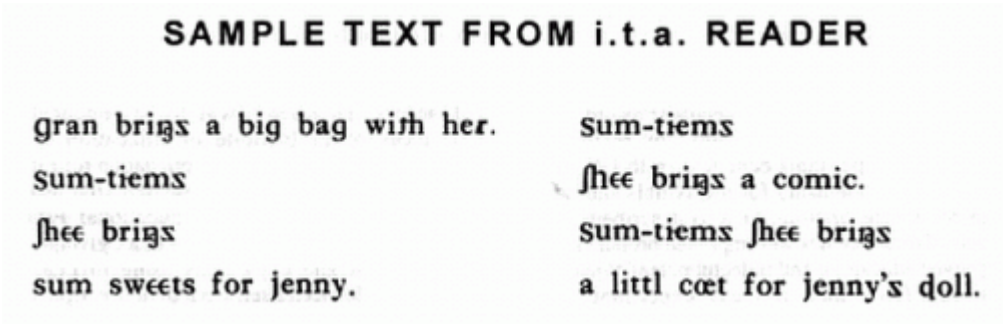
Between 1961–67 we examined how well children transferred from i.t.a. to TO (see chart of i.t.a. symbols). The table below compares children who had started learning to read with i.t.a. and children who had started in the usual way with TO. It gives the proportion of 'failures' in post-transition tests — 'failures' in quotes because we didn't really think of the children as being failures; we meant just the number who fell below a certain score in the test.

PERCENT 'FAILURES' ON POST-TRANSITION TESTS

Test	Date	i.t.a. %	TO %	N
Schonell GWRT	after 26 mth	21.3	23.3	291
Neale Accuracy	after 19 mth	41.0	42.0	457
	after 34 mth	9.8	17.5	194
Neale Rate	after 19 mth	22.7	19.5	457
	after 34 mth	4.7	4.1	194
Neale Comprehension	after 19 mth	50.8	56.0	457
	after 34 mth	14.0	24.8	194
Standish	after 34 mth	17.7	24.6	175
NFER Sentence	after 54 mth	2.6	14.1	78
NFER Comprehension	after 60 mth	10.9	20.6	92

All the tests were printed in TO, whether the children were in the i.t.a. group or the TO group. The TO children had learnt to read entirely in TO, whereas the i.t.a. children had usually learnt for 18 months–2 years in i.t.a. (the average was 18 months before the changeover). Some of the i.t.a. children tested may not have transferred, but probably the majority would have done so when the tests were given.

On the Schonell graded-word reading test (GWRT) after 26 months of schooling, there isn't a significant difference between the i.t.a. and TO children, nor is there with the Neale accuracy test after 19 months. However, after nearly 3 years, there is a big difference on the same test. There are only about half as many i.t.a. children failing in TO as TO children failing in TO, and the other results show the same thing. When you look at the very late tests, at the bottom of the table, after about 41/2–5 years there is a very big difference in favor of the i.t.a. group.



It's clear that the i.t.a. children were much more likely to achieve automaticity in the reading skill and therefore to transfer readily. The TO group on the other hand hadn't reached the same level of automaticity, though in their case perhaps we shouldn't talk about 'transfer' at all, as the children were performing a task they had been taught from the start. The point is, the TO children had less reading skill to apply to TO reading than the i.t.a. children had, although the i.t.a. children were at a disadvantage in facing a less familiar script. If you had reversed the test and tested all the children in i.t.a., the superiority of the i.t.a. children would have been even

more marked. Figures showing what happened a few weeks before the transfer reveal a big difference in favor of the i.t.a. group. The transfer was definitely a setback for the i.t.a. children in the first test after they changed over: they weren't reading as well in TO as they had read in i.t.a., but they were reading just as well as the TO children. A few months later they had recovered from that setback and were reading better than the TO children. The test on reading speed, we found, was not very valid, nor were the differences in number of words read per minute very significant. The comprehension test on the other hand showed slightly better results after 19 months for the i.t.a. group (only 50.8% 'failures', compared with 56% failures for the TO children), but the next test, after 34 months, shows a very significant advantage for the i.t.a. group with only 14% failures compared with nearly 25% in the TO group.

We also tested spelling, and the results are interesting here too.

PERCENT 'FAILURES' IN OTHER LANGUAGE SKILLS

Test	Date	i.t.a. %	TO %	N
Schonell Spelling	after 30 mth	17.4	24.9	374
	after 42 mth	3.9	13.7	102
NFER				
English	after 5 yrs	13.1	32.6	92
Capital Letters	after 5 yrs	18.5	39.1	92
Tenses	after 5 yrs	29.4	58.7	92
Spelling	after 5 yrs	39.1	58.7	92
Sentence completion	after 5 yrs	8.7	27.2	92
Abbreviations	after 5 yrs	33.7	58.7	92

The Schonell spelling tests after 30 months show fewer failures among the i.t.a. children, although they suffered several disadvantages: the spelling test was in TO, not in i.t.a.; no marks were given for the correct i.t.a. spelling; and no allowance was made for the fact that some of the i.t.a. children had not yet transferred to TO. For all that, the difference in achievement is not significant statistically, despite first appearances. But the results of the tests given after 42 months show a very significant difference between the groups in favor of i.t.a.

Another test, the NFER (National Foundation for Educational Research) test, comprised several different subtests, and after 5 years on every one of them the i.t.a. group was significantly superior to the TO group even with capital letters, which in i.t.a. are just majuscule versions of the small letters. The performance of the i.t.a. children was superior with regard to tenses, sentence completion, and abbreviations. So there is a lot of spill-over from starting out with something that works well and fits in with the child's level of ability.

§4 Skill-transfer between languages

I was in a village whose language is Hako, and where an experiment had been in progress for three or four years. All of the children there are now taught to read and write in their mother tongue, which linguists had analyzed years ago and for which prayer books and the like had been produced. The children have their first lessons in their own language two years before being introduced to English, after which everything in the school is in English. But there is also the other language, Tok Pisin, in this village, which is never taught in the school, although its written form is seen everywhere, in the prayer books, on the health posters, on the police posters, and so on. In fact it's not taught anywhere in Papua New Guinea — it's just assumed that if you have learnt to read in one language, you can read Tok Pisin too (although there was

a movement in the Lutheran missions a few years ago to teach Tok Pisin, and the idea still being thought about). A pamphlet in Tok Pisin which I picked up from a religious bookshop in the capital of the province where I was doing the research has the following sentence in it, particularly striking on account of the rude word in it: *Strongpela Dring i bagarapim yu.* It is taken for granted everyone can read that if they have learnt to read in another language.

We tested children for reading in three languages, their mother tongue, English and Tok Pisin, and what we found was this: if the children had begun to learn to read in the mother tongue, they had excellent transfer from mother tongue to both Tok Pisin and English; but if they'd started out in a strange language, English, the transfer was very poor. This was so marked that both in Tok Pisin and in English their scores were often near zero. And it wasn't only the scores: we also observed the children subjectively, and we saw the children who had started out in a foreign language were afraid to try in English, although they had been taught it. They were afraid to try any word that they hadn't been taught, any word that wasn't in their textbooks. And of course they transferred that negative attitude from the English experience into both Tok Pisin and their own mother tongue from their village.

A very important point that has to be taken into account here is that the English spelling is bound to cause them to feel uncertain, because of the uncertainty of what the letters represent. Both in the mother tongue and in Tok Pisin there is a very straightforward relationship between the letters and the sounds. Usually the people who have made up the spellings for the languages – half of them have been written now – have tried to ensure a good connection between Tok Pisin and the mother tongue.

§5 Transfer in Russia, China, Japan

Another example of this transfer is from the Soviet Union. I've just finished the manuscript of a new book, to be published by the North Holland Company in Amsterdam, and called *Cognitive Psychology and Reading in the USSR* (Downing, 1988). It's a survey of all the major works in Russian on the teaching of literacy, and one of the things I learnt from making that study of what goes on in the Soviet Union in reading is the surprising fact that in the Soviet Union from 1917 the people of that vast area have had the right to learn to read and write in their mother tongue rather than Russian, as they had to before the Revolution. And so it's quite a normal thing for people in the Soviet Union to learn to read and write in one language and then switch over to Russian later because all the higher levels of education and the materials need to be in the more common language. So the Russians have had a lot of experience with transfer. Lenin decreed that it was the duty of every citizen to learn to read and write, and in his decree he said they could learn in the mother tongue or Russian, as preferred, and that has been the policy ever since. Perhaps it was because Lenin was a schoolteacher (as was his wife Krupskaya too) and had very good intuition about how children learn to read and write; the decision would seem to have been a correct one.

There are also examples of transition, transfer of training, transfer of skill across orthographies. In China nowadays children begin with the roman alphabet, learning the phonemic Pinyin spelling of Chinese, and then switch to the classical characters, which though they've been reformed are quite unlike the roman alphabet. I don't know whether Pinyin will finally prove to have been a success: when I was in China in 1982 there was some research being done by a Chinese professor in Shanghai, and it wasn't very favorable to Pinyin. But politically it had strong support: both Chairman Mao, whose influence is still there, and Chou En-lai believed that a phonemic spelling for Chinese would result in a universal pronunciation for Chinese across China. I don't know if they were right, but that was their hope. The difficulty is that Pinyin cannot

take account of all the dialects. In the school in Shanghai I observed the teachers trying to get the children to pronounce Pinyin according to the Pekinese dialect, a lot of which is meaningless to the children. The task isn't being tackled properly, and I don't know whether it can be. The research being done in Shanghai by this professor certainly did call into question the value of Pinyin.

Japan has a similar situation. Most Japanese books are printed in a combination of two types of characters, Kana and Kanji. Each Kana character represents a syllable, and the Kanji represent morphemes or words. Young children start out with everything printed in syllabic characters, in Kana, and then gradually they switch over more and more, and the Kana characters are dropped in favor of the Kanji characters, which came from Chinese originally. In Japan this works very well because as far as I know there isn't the problem with dialects. But the kana syllabary has a perfect one-to-one relationship between written syllables and spoken syllables, at least in standard Japanese. There is however a problem with homophones, which the syllabary cannot adequately distinguish. There are a lot of Japanese jokes about homophones, especially involving misunderstood telegrams, these being written in the syllabary and not in Kanji.

§6 Maximizing the transfer of skill

Our interest in the Simplified Spelling Society of course is in how to maximize the positive transfer of skill. What can we do to make sure that we get the most positive transfer between the reformed spelling and TO? Here the concept of readiness is important. Although the term reading-readiness has been subjected to quite a lot of criticism among teachers in the last few years, it is rather meaningless criticism, because you can't criticize something that's psychologically real. We know that, regardless of what the skill is, whether it's reading or playing tennis, you can't acquire it unless you're ready to learn it. You have to have the physical maturity to manipulate the tennis racket, and you have to have learnt something about the game of tennis which you can then use in the new learning that you're going to try to acquire. So when we think about how to maximize positive transfer of skill, we can use that concept of readiness.

Let us apply this to the cognitive phase, that beginning phase where you're trying to figure out the nature of the task. The i.t.a. experiment provides some examples, and the book *Evaluating the Initial Teaching Alphabet* contains quite a lot of material it would be useful to look at, if you are concerned to maximize positive transfer of skill from one spelling to another. Before we look at a helpful example, let us remember that Professor Magdalene Vernon in 1957 was the first psychologist to put forward the idea that the main cause of reading disability is cognitive confusion, by which she meant that the child didn't understand the task to be performed. For instance, the child may not understand why *road is* spelt R-O-A-D, and begins to doubt its ability to grasp the system rationally: though the teacher says R-O-A-D is right, it doesn't seem right. The advantage of i.t.a. was that it cut down this cognitive confusion: if you spell *said* S-E-D, it isn't confusing any more. The TO children learning S-A-I-D are much more likely to be confused cognitively by the spelling form in question, but the i.t.a. children had no problem with S-E-D.

Following up Professor Vernon's theory, I wrote in *Evaluating the Initial Teaching Alphabet* (pp233–34):

> The reduction in 'general cognitive confusion' may also have been effective in two experiments conducted by Sister John… In her first experiment Sister John's subjects were an experimental group of twenty five-and-a-half-year-olds who had been learning to read i.t.a. and a control group of twenty five-and-a-half-year-olds who had been learning with TO. Specially devised nonsense-symbols similar to characters of the Greek alphabet were used

> for two tasks: matching and recognition of the symbols. The experimental i.t.a. group achieved superior scores for both tasks.

Again you see transfer at work with the strange Greek-like characters.

> On recognition the i.t.a. group's scores were significantly better. . .
> In her second experiment Sister John used new subjects in the same schools. Two groups (one i.t.a., one TO) of twenty-five four-and-a-half-year-old pupils were studied during their first six months at school. The same nonsense symbols were used, but in this experiment the testing procedure was carried out twice: (i) soon after the subjects entered the school for the first time, and (ii) six months later. On the initial test the two groups were comparable,

(there wasn't any difference because they hadn't learnt anything yet)

> but six months later the same significant difference had emerged as had been discovered in the earlier study, i.e. the children who had been learning i.t.a. for six months were better at recognizing unrelated nonsense-symbols than were children who had spent the same period learning TO.

In other words, the i.t.a. children had learnt something about the task of recognizing symbols which they could transfer over into something completely strange like these semi-Greek symbols.

> Sister John's results indicate that in learning to read i.t.a. her subjects had learned appropriate orienting responses, so that their attention was directed towards the general features of the task of discriminating and remembering abstract symbols… which were then relevant in the new tasks with the nonsense-symbols. Conversely, the greater irregularity of symbol-sound relations in TO seems to have inhibited the development of appropriate orienting responses to the task of remembering differences between graphic symbols. It seems likely that this comparative failure of the TO group represents a greater degree of 'cognitive confusion' surrounding the task of recognizing graphic symbols.

Similarly in the Papua New Guinea work, we found that if you learn to read in the mother tongue first, you get better transfer to other languages than if you start with an unfamiliar language. So it's important to start off where the child is. What is the child bringing to the situation? And in the case of learning to read, it is clearly better to start, as all the research showed, with the mother tongue, because that's what children have got. If they have thought at all about their speech and other people's speech, it will be in terms of their own language, the sound of their language, not of course the sound of some strange language which they have hardly ever met.

The same principle applies to the letters of the alphabet. In the case of New Spelling (Ripman & Archer, 1948) and what we did with i.t.a.: the task was taken closer to the child's capability by the age of 4, 5 or 6 by having a simple relationship between the writing and the speech. The problems the child has to solve are much simpler in that case than with TO.

§7 Avoiding negative transfer

In thinking about maximizing positive transfer of skill, we also have to avoid negative transfer. That's an area of psychology that we haven't time to go into in detail, but we talk about negative pro-active interference. That means we've got to avoid teaching something at the beginning which is going to get in the way of learning something else later on. It is a very important principle that hasn't been applied sufficiently in education. One of the things I found in my Russian studies is that the Russian education authorities are very keen on this particular concept. You should never teach reading and writing for example in Year 1 in such a way that it

is going to get in the way of some other aspect of linguistic achievement at a later stage. Not only in school but even at university level you should never teach something in a way at the beginning which is going to make it harder to learn something else later on. You should always learn from the beginning right through.

There was in fact some negative transfer from i.t.a. I.t.a. did a good job, as we saw from those results, but it could have been better. I said so in the book, though Sir James Pitman, God rest his soul, was not very pleased about it; but it had to be stated, because I was doing a scientific study of his work. As I said earlier, when children were tested in TO just after the transfer, they did less well in TO than they had in i.t.a., and it is possible that i.t.a. could have been designed better, to cause less of a setback when the children switched from one to the other. That is a point to bear in mind with spelling reform.

Pages 163–67, 241–44, and 285–87 in *Evaluating the Initial Teaching Alphabet* deal with the test words in the Schonell test and the Neale test. We examined them under various skill modes, and some words caused much more difficulty than others. One was the i.t.a. form *wurk* which changed to *work.* We found that it wasn't so much the configuration of the whole word, but details within the words which caused the errors; and in *work* the change from U to O produced a lot of errors. On the other hand a word like *church* did not cause problems. Another example of a gross negative effect from something for which i.t.a. didn't plan ahead was the word *show.* In i.t.a. it looked like *shoe*, so when the children saw *show,* they didn't read it right, and then when they saw *shoe,* they would probably have read it as *show,* because that is how they learnt it in i.t.a. We didn't analyze whether vowels or consonants caused more trouble, but that analysis could be done from this book. On ppl64 and l67 there are tables of words showing the number of errors, and that kind of analysis could be done from them, indeed it would be important in formulating a first stage of reform. I think that is definitely one of the advantages of Cut Spelling: there is much less likelihood that that kind of difficulty could arise.

Also relevant to the design of a reformed spelling system is this passage on p245:

> …one conclusion seems clear, and that is that in the future development of this transitional alphabet approach to the teaching of reading, a series of experiments should be carried out to ensure that every element in the design of such an alphabet and its spelling rules has been established empirically as the best possible solution in the total complex of problems involved in making the needs of the beginner compatible with maximal transfer efficiency at a later stage.

In other words, before you decide between several alternatives, you need to do some experiments to find out which will produce the results that you want. They wouldn't have to be big experiments like the i.t.a. ones, but could be quite small, such as Valerie Yule does. And then on p247 I say:

> … it seems possible that improvements in the design of a simplified alphabet, improvements in teaching material, and improvements in the methods of teaching with a transitional alphabet could reduce the extent to which TO sets back pupils' progress at the transition stage.

So besides the design of the alphabet, one needs to think about how it's going to be presented to children for teaching. When we set up the experiment, we went straight into it with very little idea of what was going to happen. But many of our teachers did develop of their own accord very good ways of making sure that children got over from i.t.a. to TO. We published some of

their findings in a magazine that we then had for teachers. A lot could be done in preparation for transition, however.

§8 Conclusion

What I've tried to say is that reading, writing, speaking and listening are each what we call in psychology a skill. And in each case the many subskills that go into those major skills pass through those three phases: the cognitive phase (figuring out what you have to do), then mastery through practice, and then automaticity. If you want to maximize transfer, it's that automaticity that you have to try to achieve in the beginning stage of teaching children in school, because once you've achieved automaticity, you never lose the skill, and you're going to have the easiest transfer of that skill to other orthographies and other languages.

§9 Points raised in discussion

9.1 Experiments before the i.t.a.

Chapter 2 of *Evaluating the Initial Teaching Alphabet* is entitled 'A Review of Previous Investigations', and reports on Miss McCallum of Cowdenbeath, Scotland, getting good transfer to TO after using the International Phonetic Alphabet in a small experiment. Maurice Harrison's history of the Simplified Spelling Society (Harrison, 1971) refers to the Society's pamphlet (Simplified Spelling Society Pamphlet No.7, 2nd edition 1942) outlining earlier experiments carried out in 1915–24 in 16 schools, mainly in Northern England, but also in Scotland, London and elsewhere in England, where children had been taught to read using a reformed orthography; the headteachers wrote very graphically about it. What we notice is that good ideas like this have not lasted, but have disappeared.

9.2 I.t.a. Federation & Foundation

I.t.a. hasn't disappeared yet [*It was still taught in a few schools into the 1990s — Ed.*] because the teachers formed the i.t.a. Federation to support each other. It started in Australia, and at my suggestion it was set up in Britain too and gave the teachers the strength to carry on. Then there is the i.t.a. Foundation financed by money left by a millionaire in the United States. It mainly exists as a funding organization, giving grants to people for research. They've got quite a good service going where they go round and give workshops and so on, but it no longer operates in Britain.

9.3 Why i.t.a. declined

Godfrey Dewey had a furious argument with Sir James Pitman, trying to persuade him not to use the strange characters he had designed for i.t.a., and to use something like New Spelling instead. And i.t.a. lost popularity because parents objected to the unfamiliar letters, the augmentations. They didn't like them because they hadn't had them at school themselves, and they couldn't help their children because they didn't know how to use them, although we published a pamphlet for parents which was given away free. Parental objections were much stronger in the United States than in Britain, and i.t.a. has nearly disappeared in the United States, because in the United States the schools have to do what the parents tell them, and the parents have succeeded in squashing nearly all innovations that caused them any disturbance. But in Britain by the summer of 1986 less than 100 schools were still using i.t.a.

9.4 Effect of i.t.a. on different abilities

It is sometimes said that the brightest children were helped least by i.t.a., the least able children more, and those of average ability most of all. From the graphs in *Evaluating the Initial Teaching Alphabet,* on the other hand, it looks as though the brightest children gained most, and the slow ones didn't gain at all. But Professor Vernon of Reading University took me to task about that

and said I should have looked at the results in another way, which is why afterwards I published a short article *i.t.a. and Slow Learners—a reappraisal* (Downing, 1969). There I analyzed the data as she suggested, and it showed that the slower children did gain from i.t.a. I'm very glad she drew my attention to that, because the graphs in the book are misleading in suggesting that slower children were not helped. The problem was that the slow achievers probably didn't have enough time with i.t.a. to show on the graphs. Vera Southgate and her colleague Professor Warburton (Warburton & Southgate, 1969) went round the country interviewing and did a very good nonstatistical study which showed the teachers really felt the slow learners had got a lot out of i.t.a., and I think they were right.

9.5 Testing for the Hawthorne effect

It is often asked how far the Hawthorne effect may have helped the success of i.t.a., in other words, whether those involved may have been additionally motivated by the sense of being given extra attention rather than by the advantages of i.t.a. itself. We did an experiment deliberately to create a Hawthorne effect in the control group that was using TO. Whenever we did something for the i.t.a. teachers, we did something for the TO teachers too. We had two days of workshops for teachers in i.t.a. so they could learn how to use the new characters. Of course, we couldn't teach the TO teachers how to use the TO characters, but we did put on workshops for them too, for which we brought in well-known educational speakers and so on. They were given hints and special treatment. Then we compared the children in their classes with the children in the previous year, where the teachers hadn't had any special care, and there was no difference with them. I don't think there was any evidence for the Hawthorne effect with i.t.a. It would be the teachers rather than the five-year-olds who would be susceptible to it, and they would pass it on to the children; but the children seemed unconcerned by us coming into the classroom and soon got used to us.

9.6 Why teachers adopted i.t.a.

We should perhaps have done a social psychological study on whether the teachers involved might have been selfselected as the most enthusiastic. I did talk informally to headmasters and headmistresses about why they were in the experiment, and there was a wide range of reasons. In Wolverhampton we had two extremes. One was a school in a very poor neighborhood, and the headmaster said, "Oh, there are so many problems of reading here. We'll try anything, and this is something we haven't tried". Then at the other end of the town, in an upper-middle-class suburb, the headmaster, who had a very good reputation with the local authority for his school, said, "Well, when I saw the people who were volunteering to do i.t.a., I thought you ought to have one person who had his head on his shoulders." Then in another school, in Stoke-on-Trent, the headmistress, who had the best reading results in the city, had looked at i.t.a. and decided it would produce better results — she didn't want to lose her place being top in reading in town. So there were all kinds of different reasons for them being in the experiment. It was the headteachers who decided, some more democratically than others — some decided and then told the staff, and some consulted the staff first.

9.7 Teachers' objections to i.t.a.

I.t.a. was designed as a transitional system for children, and was never intended for general use. One of the reasons why i.t.a. didn't succeed as Sir James Pitman hoped it would, and one of the reasons that was given by many teachers and headteachers for not trying it, was that it was only transitional, and children couldn't continue to use it for the rest of their lives. They said, if you had suggested spelling reform, and hadn't brought in those new letters, but just used the alphabet in a more sensible way, then we would have accepted it, but not something like i.t.a. that was only going to be used in the first years of school.

9.8 Advantages of Cut Spelling

The idea behind Cut Spelling (Upward, 1996) on the other hand is that it could serve both functions: it would offer an improved system to help children learning to read and write, which they could continue to use indefinitely. Insofar as it is compatible with TO, children would be able to read TO but would never need to learn to write it. In this way TO and CS would exist side by side. Some people talked about children having to forget i.t.a. after the first two years of school, but CS would go on being useful for ever. And people can see it's got practical uses.

It is asked why New Spelling is less suited to immediate introduction and continued use than Cut Spelling, when for instance for *come* New Spelling proposes the fully phonographic form *kum,* while Cut Spelling *com* only removes the final -E from the TO spelling. One reason is the need for compatibility with TO, as was already demonstrated above over the difficulty of transfer from i.t.a. *wurk* to TO *work.* Another reason is that although you might say to parents that their child could continue to write *kum* for the rest of its life, they would fear the child would attract ridicule in the adult world by using such forms. On the other hand with Cut Spelling you could establish a parallel system of writing which had its own practical use for ever, just as we have arabic numerals in parallel with roman numerals, and both have their uses. This would appeal to the ordinary parent and the ordinary teacher as something that would help children to learn to read TO and then afterwards they could use it as an alternative system.

Any new spelling scheme, Cut Spelling or New Spelling, would have to be sold to the public, and CS has several selling points. Judging from my earlier background in public opinion research, Cut Spelling has a lot to offer from the point of view of public acceptance. There's a lot in it which would appeal to people lacking specialist knowledge of the subject. Some aspects of it are things I've done for myself: I've never learnt any particular shorthand, but I've made up my own as many people do, and a lot of things that are done in Cut Spelling are very like shorthand. I think a lot of people would be attracted by its economy, and it wouldn't look as strange as i.t.a. If I was a member of the general public, I'd look at CS and say, "Ah, that looks useful to me, I could use that for making my notes, because it's so short, much shorter — that'll save me a lot of writing, that will". You've got the economy, quite a big percentage, and then if everybody used it in business and so on, it would save a lot of time and paper, etc. You could sell CS on those lines, as well as on educational lines. It might also become popular because of computing. What you'd have to do to sell New Spelling would be something that Chris Jolly and I have been talking about for quite a long time: you might be able to sell it on the grounds that this would be a good way of being able to write down the way people pronounce things. But you can't assume in my opinion that the public is going to buy spelling reform. My feeling as a psychologist is that Cut Spelling would be much easier to sell to the public.

The way in which CS had been seen as relating to New Spelling is as a first-stage reform eventually leading on to a thoroughgoing reform like New Spelling, which would be the ultimate destination after a series of intermediate reform stages. The Simplified Spelling Society has been considering reform from two opposite directions at once, discussing a revised version of New Spelling at the far end of the process, and Cut Spelling at this end as the first stage. As yet the CS Rule for omitting letters representing post-accentual schwa before L, M, N, R constitutes a discrepancy between the two ends, which should be brought into line with each other. Both a first stage reform and a long-term proposal are needed.

9.9 Japanese

In Japan the children transfer from the Kana syllabaries to Kanji because the education system requires them to learn nearly 2,000 Kanji characters by the time they leave school. I believe the Kanji characters are needed to avoid confusion of homophones, such as can occur in telegrams, for which only Kana is used. In normal adult writing you see a combination of Kana and Kanji, the Kana words being used for the less important words, while the nouns will be in Kanji characters, which are complicated ones derived from Chinese. The difference between them hits you in the eye, with the important Kanji characters standing out in the sentence, and Kana in between. There are two kinds of Kana, Hiragana and Katakana, one of which is used tor foreign words. They print words in the roman alphabet, or Romaji, for foreigners. But if you hire a car, the maps are not in Romaji, and it's an interesting exercise to transfer your reading skills from English to Japanese in map-reading. The important items will be in Kanji, not Kana, and for instance we had to look out for the sign of the man hanging on the gallows!

9.10 English in India

There's a tendency in India for reasons of snobbery to send children to convent schools where English is the medium of instruction. That is spreading to smaller towns now, where there is not the English atmosphere which can obtain in a city like Bombay (Mumbai), where quite a lot of people use Indian English. Instead there's a total Marathi atmosphere, in the midst of which there's an English medium class, taught by Marathi speakers. There must be a danger the children there would be much better off speaking their own mother tongue first and then transferring to English — unless they're extremely bright.

9.11 Age of optimum transfer

There have been a lot of studies comparing different age levels of introduction to a second language. The popular idea is, the younger you start, the easier it is (that's the reason for the current Canadian fashion for French immersion with very young children). But it's not true: studies show that in general adults are better at learning a second language, and that the older the child, the better the result. There is one important exception: younger children pick up the phonology, the pronunciation better. So perhaps children should learn to speak a foreign language when they are young, but leave formal study of it until later.

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[Journal of the Simplified Spelling Society, 28, 2000/2 p11 in the print version]

3. Chart: The Initial Teaching Alphabet (i.t.a.)

THE INITIAL TEACHING ALPHABET

No.	Character	Name	Example	No.	Character	Name	Example
1.	æ	ain	æbl	23.	y	yay	yellœ
2.	b	bee	but	24.	z	zed or zee	zœ
3.	c	kee	cat				
	d			25.	ſ	zess	aſ
4.	ɖ	did	ɖog	26.	wh	whee	whie
5.	ɛɛ	een	ɛɛch	27.	ch	chay	church
6.	f	ef	fun	28.	th	ith	thin
7.	g	gay	gæt	29.	ð	thee	ðen
8.	h	hay	hæ	30.	ʃh	ish	ʃhip
9.	ie	ide	ies	31.	ʒ	zhee	meʒuer
10.	j	jay	jam	32.	ŋ	ing	siŋ
11.	k	kay	kiŋ	33.	ɾ	er	heɾ
12.	l	el	lip	34.	ɑ	ahd	fɑðeɾ
13.	m	em	man		ɑ	ask	
14.	n	en	not	35.	a	at	at
15.	œ	ode	œpen	36.	au	aud	autum
16.	p	pee	pæ	37.	e	et	egg
	q			38.	i	it	it
17.	r	ray	rat	39.	o	og	on
18.	s	ess	sit	40.	u	ug	up
19.	t	tee	top	41.	ω	oot	bωk
20.	ue	une	ueſ	42.	ωω	ood	mωn
21.	v	vee	vois	43.	ou	oun	out
22.	w	way	wet	44.	oi	oin	oil
	x						

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4. John Downing's i.t.a.
Evaluation Chris Upward

John Downing (1967) *Evaluating the Initial Teaching Alphabet: a Study of the Influence of English Orthography on Learning to Read and Write.* London: Cassell & Company Ltd, 327pp. Chris Upward here sumrizes in Cut Spelng John Downings report on th i.t.a. experimnt wich he directd. It represents th most importnt and extensiv reserch evr conductd into th practicl efects on litracy aquisition of simplifying english spelng. Previus items on th i.t.a. (beside John Downings articl in Item 2 of this issue) that hav apeard in *JSSS* ar Threadgall R (1988) The Initial Teaching Alphabet: proven efficiency and future prospects. ***JSSS* 1988/1**, Item 6, and Threadgall R (1993) Remedial Education and a Consistent Alphabet. ***JSSS* 1993/2**, Item 3.

1 Th problm: is th traditionl orthografy of english an importnt cause of dificlty in lernng to read?

Chaptr 1 discusses difrnt vews of th iregularity of english spelng. Som emfasize th inadequacy of th roman alfabet and propose extra letrs, e.g., to replace digrafs (singl letrs insted of CH, SH, TH, etc) or for long vowls (especialy replacing 'majic E'). Othrs emfasize th many ways of spelng a givn sound and propose for instnce givng th same spelng to th vowls in *vain, vane, vein*. Othrs again wud remove redundnt letrs from th alfabet (eg, rite K, KW, KS insted of C, Q, X); or replace blok capitls by enlarjd versions of th smal forms, so *danger* wud be capitlized as *danger*, not *DANGER*. Like its mid-19th century ancestr *Fonotypy*, th i.t.a. was not desynd as a permnnt replacemnt for traditionl orthografy (t.o.), but as a transitionl initial lernng sceme.

Downing comnts that these ideas ar based on lojicl expectation, not on reserch evidnce of childrens dificlties; nor do they tel us wich problms cause most dificlty, and wich cause least.

2 A revew of previus investigations

Chaptr 2 first revews reserch into th readng process carried out befor th mid-1960s. Som influential reserch asumed that, because skild adult readrs dont normly spel words out as they read, beginrs dont need to eithr, and that they therfor dont need to lern th sequence or sound values of letrs in words. One emnnt reserchr beleved children undr th aje of 7 incapabl of graspng th fonic principl. Such ideas implyd that spelng reform was unecesry. Downing furthr notes th lak of comparativ reserch into litracy aquisition in difrnt languajs (*but see Downing, 1973.—cu*). Experimnts purportng to sho that iregulr spelngs ar scarcely hardr to read than regulr spelngs ar refuted.

Th successful use of fonemic spelng systms in sevrl places in th northeastrn USA in th late 19th century is described, tho not al th details ar recordd (did they use Isaac Pitmans *Fonotypy*, or regulrized roman?). Furthr experimnts conductd in th UK in th erly 20th century, one using fonetic symbls and othrs using th SSSs *Nue Speling*, ar also described. Two side-efects of these scemes wer improved pronunciation and improved educationl and intlectul potential jenrly. Downing finds that al these experimnts wer insuficiently controld and lakd objectiv testng — weaknesses he pland to avoid in evaluating th i.t.a.

3 Th Initial Teaching Alphabet: bakground and description

Th idea for th i.t.a. experimnt orijnated in th House of Commons. In 1949 James Pitman, MP (Conservative, Bath), secndd th Private Members' Bill presentd by Mont Follick, MP (Labour, Loughborough), wich was narroly defeatd. Anothr oprtunity arose in 1953, wen they presentd a Bill calng for investigation of th litracy gains that myt result from scools using simplifyd spelng. Tho oposed by th Govrnmnt, this Bill was passd by 65 votes to 53. Th eventul outcom was Govrnmnt aproval for reserch into th efect of iregulr spelng on litracy standrds.

Pitman and Follick disagreed on th aim of th simplifyd spelng. Follick was intrestd primarily in a spelng reform to benefit non-nativ speakrs (he ownd a chain of languaj scools), wile Pitman wantd to test a transitionl orthografy for th benefits it myt ofr beginng readrs. Downing notes that reserch myt hav shown ther was not necesrily a conflict between th two aims. But th disagreemnt was also persnl, as both Follick and Pitman wer keen to promote ther own scemes. Th dispute endd wen Follick died in 1958.

Downing comnts that th i.t.a. was in th end efectivly imposed by Pitmans persnality, influence and resorces. It was desynd as an amalgm of *Fonotypy*, th alfabet devised by his granfathr Isaac Pitman, and th SSSs *New Spelling*. Th i.t.a. was not based on sientific reserch into wat systm myt be most efectiv, nor on a reasnd choice of alternativs (Follicks sceme fel out of contention with its authrs deth, and Axel Wijks *Regularized English* was rejectd despite his passionat advocacy). Th i.t.a. was a clevrly desynd compromise between ful regularity and suficient simlarity to t.o. to facilitate transfer; but it did not necesrily represent th best of al posbilities.

To launch th i.t.a. in 1960 Pitman secured suport from th Ministry of Education, th Local Education Authorities Association, and th National Union of Teachers. Th reserch was to be conductd undr th auspices of th Institute of Education at London University and th National Foundation for Educational Research thru a Reading Research Unit atachd to th Institutes Department of Educational Psychology. Copyryt was renounced for th i.t.a., giving anyone th ryt to print and copy texts using th i.t.a. Th SSS meanwile distnced itself from th hole entrprise.

Pitman did not link th i.t.a. to a specific teachng method, such as look-and-say or fonics. His desyn was to aid lernrs transfer to t.o. by keepng som featurs of t.o., such as dubld letrs, T befor CH, th alternativs C/CK/K, vowl letrs representng shwa (or even comnly silent, such as th secnd E in *every*), and two or mor spelngs for as many as ten sounds. Furthrmor, som overlaps with t.o. cud ocur, as with i.t.a. *union* for t.o. *onion*. I.t.a. was desynd to represent forml platform speech, with som scotish overtones.

Pitman aimd to asist transfer by ensuring simlarity in th jenrl apearance ('configuration') of words in i.t.a. and t.o., especialy ther 'top coastline', ie, th sequence of letrs with and without asendrs. On th othr hand, th i.t.a. did reduce th numbr of alternativ spelngs for sounds, it replaced digrafs by ligaturs, and it removed 'majic E' (eg, *hate* became *hœt*, *hope* became *hœp*).

4 The first i.t.a. experimnt: aims, desyn and method

Downing set great stor by sientific method (th i.t.a. was an 'experimnt'), and proposed nine 'hypotheses', to be proved or othrwise. Th hypotheses stated that, compared with children aquiring ther litracy skils thru t.o., children lernng thru i.t.a. shud:

1) lern fastr (since i.t.a. involvd less lernng)
2) read with fewr errs (since i.t.a. was mor regulr)
3) perform no worse aftr transfer to t.o. than previusly in i.t.a.
4) read t.o. with greatr acuracy, fluency and undrstandng
5) rite mor
6) hav a larjr vocablry
7) spel betr
8) solv problms unconectd with litracy betr
9) hav hyr atainmnts in mathmatics.

Overal, th purpos of th experimnt was to investigate th efect of t.o. on th process of lernng to read.

Paralel groups of children aquiring ther initial litracy using i.t.a. (th experimentl groups) and t.o. (th control groups) wer set up. Th two sets of groups wud be closely machd by varius criteria: they wud use th same readng books (th *Janet and John* series in t.o. and transcribed into i.t.a.); scool conditions wud be simlr; and evry efrt wud be made to prevent any Hawthorne efect distortng th results (ie, th control groups wud get as much special atention as th experimentl groups). Even so, a perfect mach wud not be posbl.

Wen scools wer invited to participate, in th first year (1961–62) too few enrold (only 20 experimentl groups and 33 control groups); but by 1963 th experimentl groups numbrd 87 (by 1966 nearly 1,800 scools in England wer using i.t.a.). Anothr erly dificlty was th insuficiency of i.t.a. readng material. Th teachrs, wethr teachng experimentl or control groups, wer to use ther norml teachng methods, wich in most cases ment beginng with 'look-and-say'; only about one scool in twenty taut fonics first. Th timing of transfer from i.t.a. to t.o. for each child was left to th teachrs. (Tho beginng with look-and-say, som i.t.a. children spontaneusly developd fonic skils, so improving ther test scors.) Parents wer fuly informd of th experimnt in advance.

Mesurmnt of performnce in both th experimentl and control groups was based on varius factrs. Progress was mesurd by how many books in th basal readr series each child completed by certn dates. Th Schonell Graded Word Readng Test mesurd childrens ability to read singl words. Readng acuracy, fluency and comprehension wer mesurd by th Neale Analysis of Reading Ability. Th amount of riting produced in a week was quantifyd, and th numbr of advanced words used was taken as a mesur of vocablry. Othr tests used wer th Standish test of comprehension from silent readng and th Schonell Graded Word Spelling Tests.

5 Results of th first i.t.a. experimnt

Chaptr 5 first describes th care with wich th reserch was conductd. Cheks wer made for a Hawthorne efect. Scools wer machd by orgnizationl and sociolojicl criteria, with many scools rejectd for failur to meet th criteria. Wher machng was less than perfect, th reserchrs ensured any advantaj normly lay with th t.o. and not th i.t.a. groups. Th numbr of children testd totald 660 each for th i.t.a. groups and th t.o. groups, thru reduced numbrs and subsets for som of th tests, numbrng 459, 433, down to 152 for i.t.a. and t.o.

Th i.t.a. lernrs made much fastr progress thru th basal readrs than did th t.o. lernrs: aftr 21/2 years 78% of th i.t.a. lernrs had passd beyond Book 5, but only 39% of th control group children had don so. This satisfyd Hypothesis 1 (se §4 abov).

The Schonell word recognition test produced an avraj scor of 18% in i.t.a. but only 7% in t.o. aftr one year, and aftr 11/2 years 34% and 15%. In th Neale test, th scors for acuracy, speed and

comprehension wer respectivly 25, 26 and 7 for i.t.a., against 14, 25 and 5 for t.o. This satisfyd Hypothesis 2.

Howevr, Hypothesis 3 (i.t.a. lernrs shud perform no worse wen testd in t.o. than in i.t.a.) had to be rejectd. Even if th i.t.a. lernrs had transferd to t.o. as long as four months befor th test, ther performnce was stil worse than it had been in i.t.a. (not til th end of th third year was this setbak overcom). Th i.t.a. lernrs wer nevrthless superir to ther t.o. equivlnts by th great majority of tests, notwithstandng th setbak.

Th Schonell readng test (first 50 words of th ful 100) identifyd th most err-prone spelngs. Since th words wer listd in ordr of dificlty, th numbr of errs grew stedily thru th test; but som words stood out as causing mor errs than expectd. Such words, with ther position in th list, wer: 6 *school*, 12 *road*, 15 *light*, 19 *people*, 21 *dream*, 28 *beginning*, 29 *postage*, 30 *island*, 33 *ceiling*, 36 *canary*, 47 *orchestra*, 48 *knowledge*. Of these 12 words, 9 contain long vowls difrntly spelt in i.t.a., and at least 6 contain redundnt letrs. Downing noted that it was fonicly misleadng letrs rathr than th chanjed apearnce ('configuration', 'top coastline') of words that caused most dificlty.

Hypotheses 5, 6 and 7 wer satisfyd: th i.t.a. lernrs rote nearly 50% mor than th t.o. lernrs, they had a wider vocablry, and they spelt mor acuratly in t.o., tho here ther advantaj only became significnt in ther 4th year of scoolng. Th i.t.a. lernrs did not outperform th t.o. lernrs in jenrl problm-solvng (Hypothesis 8), and in mathmatics only marjnly (Hypothesis 9).
Th tests also showd wethr lernrs of hy, avraj or lo achevemnt particulrly benefitd from th i.t.a. Across th ranje of tests, th ablest lernrs benefitd soonst and most, th midl categry gaind less dramaticly, and th least able only benefitd aftr som delay. (Downing notes in §9.4 of his articl abov [p9] that th valu of th i.t.a. for lo ability lernrs may hav been undrstated.)

6 Discussion of th results of th first i.t.a. experimnt

Chaptr 6 first restates th two main aims of th reserch: to find how big a problm t.o. represents for lernrs, and wat dificlties arise at transfer from i.t.a. to t.o.

Th reserch had methodlojicl limitations, concernng variabls (same books used, but teachrs and teachng methods varied), th tests (do Schonell and Neale basicly test th same thing?), and statisticl analysis. Experimentl groups wer testd in 33 scools, control groups in anothr 33, and paralel i.t.a./t.o. classes in 8 scools. Perhaps th results wer distortd by using volunteer teachrs. Perhaps i.t.a. improved th skils of th teachrs. Great care was taken to avoid posbl causes of bias in favor of i.t.a., and syns of a Hawthorne efect wer sot, but non found. If anything, th i.t.a. side of th experimnt was at a disadvantaj (eg, in som cases shortaj of books, yungr lernrs, worse scool bildngs).

Othr mesurs of achevemnt wer as follos: by Term 5 th i.t.a. lernrs wer on avraj on Book 4 of th basal readrs, th t.o. lernrs stil on Book 2; by th Schonell test, i.t.a. lernrs then recognized 21/2 times as many words as t.o. lernrs. In fre composition, i.t.a. removed th limitation of t.o. that children cud only use words hos spelng they new or cud ask, and th i.t.a. children consequently rote mor and used a wider vocablry. Th greatr dificlty of t.o. is seen in th difrnt spelng of th vowl in *I, my, night, like, buy, climb, eye, die*, wich in i.t.a. is spelt with ligaturd *ie* in evry case.

Th most able lernrs gaind most from i.t.a., tho that did not mean that weakr pupils did not also gain (even wen ther gains wer minml, teachrs comntd how much mor purposfuly and independntly th least able workd in i.t.a.). A jenrl lesn was that less able lernrs needd mor time to mastr th i.t.a. befor transfer to t.o.

Th results wer confirmd from smalr experimnts by independnt reserchrs. Sister Johns experimnt (se §6 of John Downings article on p7 abov) was especialy striking, shoing how th cognitiv powrs of i.t.a. lernrs gaind mor widely than just in terms of litracy.

Regardng 'readng rediness', this was not only a matr of syclojicl rediness, but also dependd on externl factrs, one being th riting systm. It may be that children ar redy to aquire litracy skils erlir using a mor regulr riting systm. In terms of lernng sycolojy, th success of i.t.a. is du to th reduced 'cognitiv confusion' pupils experience, compared with t.o.

Th advantajs of th i.t.a. wer clearly demnstrated; but that did mean they wer du specificly to th i.t.a. caractrs. It may be that any regulrized riting systm wud hav givn equal benefits, and a systm that had been betr desynd myt hav givn even greatr benefits than th i.t.a.

Infnts teachrs felt th i.t.a. was worthwile for th imediat benefits lernrs enjoyd, regardless of longterm benefits for ther subsequent performnce in t.o. Teachrs ofn thot pupils made th transfer scarcely noticing th chanje, but th tests showd they sufrd a real setbak that lastd for som time aftr. Yet by most tests they stil outperformd th t.o. lernrs. Furthrmor, th setbak was not permnnt, being overcom by th end of th third year.

Regardng James Pitmans aim to keep a degree of simlarity between i.t.a. and t.o. spelngs, som i.t.a. forms wer identicl in t.o. (eg, *milk*) and othrs wer very close (eg, *tree*), but othrs involvd considrbl chanjes. On transfer lernrs at first misred many long vowls, as in *road, train, people, dream*, shoing that fonic iregularity posed a bigr problm at transfer than chanjed configuration. Particulr problms wer reveald in th tests from interference as between i.t.a. *shoe* and t.o. *show*, from th silent letrs in *school, island, gnome*, and from A in *enabled, safety, wandered*, AI in *regain*, C in *ceiling, centre*, G in *imagine*, I in *final*, IE in *brief*, IGH in *frightened*, OR in *work* (confused with *walk*), OW in *now*, PH in *nephew,* T in *action*. Many errs wer also made with *age, attractive, canary, fruit, huge, magician, these, whom*. Downing beleved much more reserch was needd to desyn a systm for optmm transfer. Transfer may also hav been mor dificlt because teachrs lakd experience and had not yet found th most efectiv methods; and they may hav been temtd to transfer too erly, rathr than wait til th children wer fluent in i.t.a.

Readng ajes by th end of th third year wer 8 years 9 months for i.t.a. lernrs, and 8 years 4 months for t.o. lernrs. Aftr transfer, al ability levls of i.t.a. lernrs improved fastr than th t.o. lernrs, but abler lernrs fastr than th less able. A relativ weakness of th i.t.a. groups was th tendncy not to dubl consnnts in t.o. — perhaps because ther fonic skils gave no reasn to do so.

7 A secnd i.t.a. experimnt to provide mor rigrus control over certn variabls

A secnd i.t.a. experimnt was begun in 1963 to examn abov al th variabl of teachr skil and persnality, and also th efect of classroom visitrs and externl publicity.

For th secnd experimnt two paralel classes wer set up in 16 scools, with th same teachr responsbl for litracy teachng in both, using i.t.a. for one class and t.o. for th othr. Thus any variabl arising from teachr persnality wud be removed. Both th i.t.a. groups and th t.o. groups containd som 550 children in al.

This aranjemnt created varius dificlties, such as unequal time spent in th two classes, difrnt teachng patrns, difrnt expectations, difrnt teachr prefrnces (most teachrs preferd using i.t.a.). Sevrl scools faild to maintain th conditions required for th thre years, and wer excluded from th experimnt. So wile th variabl of teachr persnality was controld, som othrs wer not.

Th same tests wer aplyd as in th first experimnt, but th results wer rathr difrnt. Altho most i.t.a. groups made fastr progress initialy, ther advantaj was ofn not significnt. In th t.o. tests taken in th midl of th secnd year th i.t.a. lernrs performd slytly less wel than th t.o. lernrs, and tho they regaind ther initial advantaj at th end of th secnd year, it was less markd than in th first experimnt, and was reversed at th end of th third year. Not even th most able i.t.a. lernrs in th end significntly outshon ther t.o. countrparts, as they had so strikingly don in th first experimnt. Th secnd experimnt nevrthless confirmd th two main findngs of th first experimnt: litracy skils ar mor esily aquired in i.t.a. than in t.o., but th transfer from i.t.a. to t.o. sets lernrs progress bak.

Th Schonell reading tests sujestd th same conclusion as in th first experimnt: Pitmans idea that a words jenrl configuration wud determn how esily lernrs transferng from i.t.a. wud be able to read its t.o. form was not validated; on th contry, dificlties wer caused far mor by difrnces of sound-symbl corespondnce. Beside th words alredy found to be hard to recognize in th first experimnt, th folloing wer noted in th secnd experimnt: *something, biscuit, crowd, angel*.
So wy did th secnd experimnt not demnstrate th gains made from using i.t.a. so decisivly as th first experimnt? First, al th scors, in both i.t.a. and t.o., tendd to be loer in th secnd experimnt. No externl factr (eg, greatr social problms) was found to acount for this; but it was suspectd th teachrs wer teachng at a mor relaxd pace. Certnly th date of transfer from i.t.a. to t.o. (decided at th discretion of each teachr) tendd to be significntly later in th secnd experimnt, so that fewr i.t.a. lernrs wer familir with t.o. wen they first took th t.o. tests. Th report on th first experimnt had surmised that a later date of transfer to t.o., wen mor pupils wer fluent in i.t.a., myt help; but th secnd experimnt sujestd th oposit. Posbly ther was a negativ efect if th habits of readng and riting i.t.a. became too ingraind befor lernrs confrontd t.o. A furthr factr that may hav adversly afectd performnce in th secnd experimnt was that teachrs disliked being split between two classes, using i.t.a. with one and t.o. with th othr.

8 Conclusions and recmendations

Conclusions

Th first i.t.a. experimnt showd how lernrs benefitd from i.t.a. Th secnd experimnt, in difrnt conditions, produced less positiv results, a conflict that needs investigation. Most tests showd transfer to t.o. causing a setbak (no procedurs for minmizing it wer availbl), and slo lernrs needd perhaps to continu with i.t.a. beyond 3 years. One dificlty of i.t.a. for beginrs was that 'b/d' wer at first mirr-imajs, as in t.o.; but this was soon rectifyd by givng 'd' a short tail. Th tests showd t.o. as a serius cause of dificlty for lernrs, impeding readng, riting and vocablry developmnt, and that a simplifyd, regulrized orthografy reduces cognitiv confusion by clarifying sound-symbl corespondnces.

Recmendations

Of th 10 recmendations, No.8 is by far th most detaild.

1) Th i.t.a. shud be mor widely used, but teachrs need trainng, and th i.t.a. shud be improved.
2) Transfer to t.o. shud not be rushd, especialy for weakr lernrs.
3) Th best time for transfer needs to be reserchd.
4) Th first i.t.a. books wer transcribed from t.o. New i.t.a. books using wider vocablry ar needd.
5) Methods of teachng and of transfer shud be reserchd.
6) Th trainng of litracy teachrs, especialy in i.t.a., needs investigating. They may lak th requisit linguistic and syclojicl nolej.
7) New litracy tests shud be developd specific to i.t.a., intrnationly if posbl.
8) Th i.t.a. shud be seen not as an ideal, but as exemplifying a 'simplified and regularized writing system (s.r.w.s.).' Reserch and desyn of an improved s.r.w.s. can take place in an experimentl sycolojy labratry, without extensiv fieldwork like th i.t.a. experimnt. Ther is a conflict between th ideal s.r.w.s and th demands of transfer and implmntation. Transfer is

esiest if th s.r.w.s. is close to t.o.; and closeness to t.o. makes it mor acceptbl to teachrs, parents, publishrs and printrs, and to othr english-speakng cuntries, including those in Africa and Asia.

Th i.t.a. experimnt reveald weaknesses in its desyn. It is not as simpl as it cud be (havng C, K, CK for th same sound is confusing), and its special caractrs put peple off. It wud do wel to abandn th letr C, dubld consnnts, reverse Z (*zess*) and som alternativ spelngs (teachrs wer disapointd that i.t.a. did not hav one-to-one sound-symbl corespondnce). Ther is no evidnce those complications aid transfer, and they confuse both lernrs and teachrs. Th special caractrs ar poorly desynd for handriting. Difrnt colors or diacritics cud betr distinguish th two values of TH or OO. Simpl ligaturs for th digrafs CH, SH, TH, NG, EE, AU, OE, insted of th special i.t.a. caractrs, wud carry over directly into cursiv handriting. Th caractr '*æ*' was hard to rite (ligaturd 'ai' or 'ay' wud be esir). Ther is no evidnce that *any* of th special caractrs was beneficial.

Without th special caractrs, th grafemes cud be just th comnst t.o. represntations for each sound; and transfer wud mean lernng th alternativ spelngs used for those sounds in t.o. Transfer cud then also be gradul, perhaps teachng th alternativ spelngs for one sound at a time insted of confrontng th hole of t.o. at once. An s.r.w.s. that used roman letrs wud by defnition be closer to t.o., it wud look less stranje, it wudnt require a new typ-face. Th results of labratry experimnts cud be fed into th teachng process by regulr buletns. An intrnationl comitee wud make recmendations to educators and publishrs in difrnt cuntries. If th s.r.w.s wer primarily for initial litracy, th comitee cud be domnated by educators; if it wer for permnnt spelng reform, wider intrests wud need to be representd.

9) Th orijnl british group of i.t.a. lernrs shud be folloed up over a period of 10 years (not just 4 years, as in th orijnl experimnt), to discovr longr term efects. Th i.t.a. soon came to be widely used in th USA, Canada, Australia and elsewher and those cuntries cud benefit from th exprtise developd by th Reading Research Unit at London University in th corse of th experimnt. (A footnote records that for lak of finance this Unit had to be closed down befor th evaluation was publishd, making any furthr reserch problmatic.)

10) Th chief findngs of th i.t.a. experimnt (t.o. creates great dificlties for litracy aquisition; transfer to t.o. from i.t.a. causes a setbak) both lend suport to cals for reserch into spelng reform.

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[Chris Jolly: see **Bulletins**, **Journals**, **Newsletters**, **Media**, **Books**.]

5. The Jolly Phonics story

Christopher Jolly

Christopher Jolly is Chairman of the Simplified Spelling Society, and his publishing company, Jolly Learning Ltd, published *The Phonics Handbook* in 1992. Its success led to the development of the wider Jolly Phonics programme which has contributed to a change in attitudes to phonics. This change, from a culture that was deeply antagonistic to phonics, has potential messages for the spelling reform movement.

Phonics and the Initial Teaching Alphabet

Today the term phonics is widely embraced. It is in the National Curriculum and the National Literacy Strategy in the UK, it is mandated in Californian schools (but see the following article by Patrick Groff in this issue), and it is increasingly accepted around the world.

Back in the early 1990's this was not so. True, *Beginning to Read* (Adams, 1990) was published at this time, but the book had to include a critical Afterword to achieve publication. *Sponsored Reading Failure* (Turner, 1990) was also published at this time, but it endured severe criticism — which cost Martin Turner his job. Its basic premise, now acknowledged, was that lack of phonics leads to reading failure. In this atmosphere it was a questionable time in which to launch a teacher's book on phonics. Indeed the events leading to it owed much to chance.

One of Chris Upward's achievements in the Simplified Spelling Society has been to develop our links with other organizations. One of these links was with the United Kingdom i.t.a. (initial teaching alphabet) Federation and Chris asked me to join him for a meeting with their committee one Sunday in October 1989.

At that time the i.t.a. was still in use in a few schools in England. At the meeting I met Sue Lloyd, who later became the author of *Jolly Phonics* and who was teaching with the i.t.a. at the time. She impressed me because she was clearly producing excellent results in teaching reading and writing, and had used standardized tests to establish this.

Sue was a primary school teacher in Lowestoft (East Anglia) where she had taught for some time. She had a particular interest in preventing reading failure. Over the years, she and her colleagues had two major breakthroughs. The first was to find that teaching all the letter sounds explicitly at the beginning made a huge difference. This might have seemed obvious, since the school was using i.t.a. However, i.t.a. teachers generally were not doing this: they were using the teaching style they were familiar with, mostly look-and-say. Telling teachers to use their previous method allowed a more accurate evaluation of the i.t.a. by the research.

First steps to research

The second breakthrough came from a research project that involved Sue Lloyd's school. Dr Douglas Pigeon, a Director of the i.t.a. Foundation, had asked if the children could be made to listen for all the sounds in words before they started reading and writing stories. For example they should know that *dog* is made up of *d-o-g*. This exercise helped the children considerably, particularly the weaker ones.

Armed with her results, Sue Lloyd enthusiastically told her LEA (Local Education Authority). The response was one of indifference. No one came to see the results or how they had been achieved.

I had started the Jolly Learning company just two years before, and by then had published 12 reading games written by Betty Root, a well-known reading expert. I had no real experience of publishing, having a background in consumer marketing. However it seemed to me that Sue Lloyd might have something of value. I suggested we should research her ideas in other schools. This proved to be immensely helpful, not just in developing the material, but also in establishing our ethos as a team.

We wanted the research to be externally evaluated, and put this to Professor Geoffrey Brown, of the School of Education at the University of East Anglia in Norwich. One of his MSc students, Rosemary Roberts, agreed to carry out the research. Rosemary thought through the evaluation procedure and decided to use a standardized test combined with feedback from the teachers. There was general agreement that the ideas were going to be evaluated on their effectiveness in teaching, rather than on, say, what the National Curriculum set out, or on what "teachers say they want".

Sue Lloyd's programme would teach all the letter sounds of English. I also wanted the research to test the use of new letter shapes for the digraphs and Sue agreed to this. These new letter shapes would distinguish, for instance, between:

a/a	cat/cart
e/ϵ	met/mϵϵt
s/ʂ	sip/ʂhip
y/ɣ	beyond/bɣ

These new letter shapes would test the idea that they would help children identify the digraph letter sounds. They were designed to be relatively unobtrusive, and to achieve this, so far as possible, by using the discrete alternatives of different letter shapes that are in common use. Curiously enough the idea came from studying a book of farewell messages written by patients to a retiring doctor, a book which included each of the alternatives above.

Sue Lloyd suggested the testing should be in pre-school. Her experience indicated that children at this young age of around 4 could pick the method up well. It would also provide a more challenging test. The programme involved 'actions' for each letter sound. Such activities could work well with the younger children. For the letter sound SH for instance, the children pretended they had to be quiet because of a sleeping baby, put their finger over their mouth, and said 'shshsh'.

So we set out to find nursery classes of 4 year olds, hoping to find three experimental, and three control classes. I wrote to all the LEA (state) schools in North Suffolk, the area which included Sue Lloyd's school. We were able to obtain interviews with a number of headteachers, and indeed to recruit some of them to the research. However this promising start soon collapsed. The LEA, having seen something of the proposals, wrote to all the schools telling them they should have no part in the research. The reason given was principally the use of phonics, which at that time was not encouraged. We had been blocked!

First experiments in schools
However, a chance meeting with a cousin of mine who had a Montessori school in Norfolk, led to a new door opening and a mailing list of all the Montessori schools in East Anglia. We contacted these schools and some independent nursery schools. To this day I have vivid memories of long evening drives to one nursery school after another in East Anglia to make a presentation with Sue Lloyd. These were formative times. At the end we achieved just one experimental school, and three controls. Interestingly, the head of the experimental school asked for a presentation to the parents to win their approval. This was successful, and their only request was for a presentation of the results when it was all over, which we provided.

For the experimental school we supplied a range of materials. For each letter sound there was a photocopiable 'Sound Sheet' that included a picture of the 'action', an illustration for colouring, and the letter itself for copying. The illustrations had been drawn by a wildlife artist, but although excellent, they were not 'friendly' enough for young children. This was one of many lessons, and all the illustrations had to be redrawn by a children's artist.

The new letter shapes appeared on these 'Sound Sheets', and in a specially adapted set of the *New Way* readers. Each piece of text in these reading books was covered over with the same text in the new letter shapes.

When it came to testing, Rosemary Roberts found, unfortunately, that no test was sensitive enough for such young children. The minimum reading age in her selected test was six years, and yet these children were not yet five. So we had to use teacher evaluations of their progress. Although subjective, they did indicate that the experimental children were doing much better than the children in the control classes.

Evaluation of the new letter shapes gave some mixed results. On the one hand the experimental children's results appeared to be better than the control children's. On the other, we found a poor understanding of letter sounds generally among teachers. They would need a much stronger phonic knowledge to be able to use the new letter shapes in their teaching. Sadly this meant that we should not use the new letter shapes. Indeed we would need to focus on explaining the phonic teaching clearly to teachers, which was another key finding.

By October 1991, two years after our first meeting, I was busy compiling *The Phonics Handbook*, Sue Lloyd's resource book for teachers. She had brought in Sara Wernham, a relatively new teacher at her school. Together we had created the 'actions' for each of the letter sounds, while Sara had a talented eye for creating child-friendly activities on the page. The alternative letters had not been included, but even so, some letter shapes were slightly adapted. The letters OO were extended horizontally for the *oo* sound in *moon*. The same letters were also 'squashed up' horizontally for the OO in *book*. We did the same for the TH in *thin*, and the TH in *that*.

I had expected objections to these shapes, but to my surprise there have never been any. I can only suggest that it is possible to have public acceptance of alternative letter shapes if the reason for them is understood.

Immediate public impact
The Phonics Handbook was just one of several new products I was to launch the following spring. Although I was very pleased with it, I thought the book was too extreme to sell well and the other new products would do better. How wrong I was!

In January Sue Lloyd mentioned that a TV crew was coming from the commercial breakfast TV company, TVam, to film for a report on phonics teaching. If they could have a copy of the book in advance they might show it. After many long nights and great support from the printer I delivered a copy just days before. The TV feature duly included Sue Lloyd, among others, finishing with a full picture of the new book and with the standard line "available at all good bookshops". Only, of course, it wasn't!

We had the first phone call soon after 9am that day from someone wanting to buy the book. Before long it was a torrent. Throughout the day there was an average of just five seconds between calls! It was not really worth putting down the receiver, just a finger on the button was enough! TVam had their lines jammed that day and for days after. They put our name on the screen the next day, and our name and phone number the following day. *Books in the Media*, a trade information magazine, described it as the biggest event since the *Sunday Times* launched a slimming book that did not exist! Our first print run was sold out in about three days.

When the euphoria had subsided the sales continued to be high, but were teachers using the programme, and did it work? The first letter came from a teacher in South Devon to say just how well it had performed. Over time it has been followed by many others. Professor Alice Coleman wrote a review saying this was a book that 'could change the course of educational history'. We seemed to have reached through to people in a very positive way.

The benefits of teaching with *Jolly Phonics* have been shown time and again in academic studies. There have been the major studies by Professor Dale Willows (in Ontario), by Dr Rhona Johnston and Dr Joyce Watson (in Scotland) and by Dr Morag Stuart (in London Docklands). Other university-based studies have been done in New Zealand and Hong Kong. Let me describe how events can lead from these studies to the widespread adoption of this programme, and the difficulties we still face.

Successes overseas

Particularly influential has been the work of Professor Dale Willows in Canada. We produced an edition of *The Phonics Handbook* for the US and Canada a year after launching the UK edition. I had heard of Dr Willows and her interest in a more 'balanced' approach to teaching reading (ie, more phonics). I visited her that spring and indeed she was most enthusiastic.

She trialed it with special needs children that spring/summer. The results were so good she was able to persuade some teachers to follow it up with a whole year group in September. Again the results were wonderful, with faxes coming through to me full of exclamation marks! Sue Lloyd visited Canada at this time, and teachers were invited to choose between her and the US author of another phonics scheme that was also presented to them. In the event I am pleased to say they chose Sue. More studies were done with younger children and Professor Willows has now had two sets of postgraduate students doing doctoral studies using *Jolly Phonics*.

At much the same time I was able to achieve feature articles in the Toronto *Globe and Mail* (Canada's national newspaper), the leading Ontario teacher's magazine, and the leading Canadian parents' magazine. We also published case studies on individual Canadian schools which led to further publicity. The net effect is that the programme is 'on a roll' in Canada where 22% of elementary schools now use it.

The main driving force leading to schools using us has been the success of just a few schools, followed by word of mouth, and publicity. This has been especially true in other oveaseas markets. One New Zealand teacher has achieved amazing publicity in the main national

newspaper and in a leading magazine. She also runs courses for teachers. The result is that we are probably used in around 15% of primary schools there.

Further developments in the UK

In Scotland, Dr Rhona Johnston and Dr Joyce Watson did a study in Clackmannanshire. They compared the teaching using synthetic phonics (where children learn all the letter sounds, and work out the sounds of words with them) with analytic phonics (where children learn to read whole words, and then pick out phonic patterns — not phonics at all, some would say). The children taught with synthetic phonics had used *Jolly Phonics*, and had reading abilities 12 months ahead of the analytic phonics children after one year. It lead to some wonderful publicity, including the BBC 9 o'clock news. This has boosted our usage to 29% of UK primary schools at the last survey, a figure which continues to grow.

After *The Phonics Handbook* we launched a range of other materials. There were colourful board books called *Finger Phonics* books, a Wall Frieze, Videos and Workbooks. However we did not have a generic brand name and people started using different descriptors. In Canada it was 'The Phonics Handbook project', in New Zealand the 'Finger Phonics scheme'. I asked Sue Lloyd and Sara Wernham to decide on a generic name. After some delay and discussion they suggested *Jolly Phonics* and said they were using the name at their school. It seemed good to me, and indeed it has become widely recognized since.

In amongst all this good news, are there shortcomings? While sales and usage continue to grow, professional approval of this kind of teaching is still only weakly established. Time and again we hear of advisors and teachers who feel the best way to teach reading, if you possibly can, is just to read to a child. The British government's Literacy Strategy has brought about a fundamental shift towards the use of phonics. However it still has not embraced the synthetic phonics methodology, and is more closely associated with analytic phonics. For instance, it provides lists of sight vocabulary words that should be worked out from their sounds.

So what have these developments shown, which could be of value to spelling reformers? Perhaps surprisingly, we have found it easier to make change among teachers than with policy makers. For the teachers themselves it has been the results they achieve that has been the most pursuasive.

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[Journal of the Simplified Spelling Society, 28, 2000/2 pp19–21 in the print version]
[Patrick Groff: see **Bulletin**, **Journals**, **Newsletters**]

6. How Fares Phonics in California?

Patrick Groff

Patrick Groff is professor of education emeritus at San Diego (California) State University, U.S.A.

Introduction

The National Assessment of Educational Progress (NAEP) is the mechanism provided by the federal government of the United States to measure the relative academic attainment of school children nationally. In 1995, the NAEP reported that children in the state of California had become the least capable readers in America. They shared this ignoble distinction with the students in a southern state, Louisiana.

This bit of educational news was quickly and widely publicized across the U.S. Louisiana was notorious for its dismal historical record of teaching its children to read effectively. On the other hand, that students in schools in California, the so-called "golden state" of America, also suffered this educational indignity was viewed with great alarm in articles and editorials in leading newspapers.

A persistent question was raised about this circumstance: "How could such an instructional calamity happen in California, of all places?" While the bad news about low reading scores in Louisiana was not surprising, the same dolorous information about California children stimulated resounding demands from the media for an explanation of this educational calamity in America's most progressive, famous, and glamorous state.

Whole Language the Culprit?

Along with its 1995 measurement of how well children had learned to read in America, the NAEP asked teachers whether the reading instruction they conducted was the Whole Language (WL) variety. Concocted in the early 1970s by education professors Frank Smith and Kenneth Goodman, the WL approach to the development of students' reading ability is based on the experimentally discredited principle that school children best learn to read in the same informal, natural manner in which they as preschoolers acquired the knack of speaking. Advocates of WL teaching thus insist that direct, intensive, systematic, early, and comprehensive (DISEC) instruction of a prearranged sequence of reading skills is time-wasting and unnecessary. Especially obnoxious to leaders of the WL movement is DISEC teaching of phonics rules (generalizations as to how letters regularly represent speech sounds).

It was discovered by the NAEP in 1995 that WL instruction of reading was more popular with teachers in California than with those in any other state. As a consequence, reading instruction specialists who believe that the method through which reading skills are developed is the key to children's success in this regard opine that WL reading instruction in California might have been the fundamental cause of the precipitous decline in its children's reading scores.

Especially assertive in this respect are experts in the teaching of reading who maintain that reading should be taught in ways based on relevant experimental research. These defenders of

empirical evidence on how children best learn to read emphasize that none of the unique principles or original practices of WL reading instruction is corroborated by experimental studies designed to test the relative efficacy of different methods of teaching reading.

The Dispute over WL's Culpability

On hearing of the adverse news about California students' deplorable performance on the reading section of NAEP, the California association of school board trustees insisted on a full-scale investigation to find the cause. Ordinarily, queries into problems regarding educational practice in schools are conducted by the California Department of Education (CDE). This is a bureaucracy expressly set up to exact obedience from the many school districts in the state to directives that it issues to them. However, the CDE had a painful conflict of interest.

In 1987, and again in 1994, the CDE mandated that WL must be used in California schools. Its "English Language-Arts Framework", a description of the reading instruction curriculum that schools are commanded to follow, liberally quotes with approval Frank Smith's unproved WL doctrines. The key one is that "children learn to read by reading," ie, that "almost all the rules, all the cues, and all the feedback (needed by students to learn to read) can be obtained only through the act of reading itself."

It thus is not remarkable that some of the WL loyalists the CDE has created declare there actually has been no decrease in reading ability among California students. That is to say, they contend that the NAEP is a bogus and reactionary measuring device that does not truly assess children's reading ability. Only the teacher loyal to WL principles is qualified to make that judgment.

Other WL enthusiasts claim that, if there were a genuine decrease in California children's reading ability in 1995, it only could have resulted from improper implementation of WL. In short, WL is defended as an absolutely unrivaled teaching process, one not open to negative criticism or future improvement. Any real decline in California students' reading skills, say the WL authorities, must have been chiefly due either to insufficient funding or to the increasing fraction of minority and non-English-speaking students from low-income families.

New Laws and their consequences

Because of the CDE's enthusiastic commitment to WL prior to 1995, and the vigorous controversy between defenders and critics, the California legislature undertook to resolve the debate. The legislature provided both sides ample opportunity to present their perspectives. After intensive deliberation, the lawmakers voted against the WL side of the issue, and in favor of the idea that reading instruction must be based on experimental findings. Several statutes were passed that proscribe the worst excesses of WL in schools that operate with state and local funds. California state university departments of education were directed to teach DISEC phonics methods. Another law stipulates that candidates for teaching credentials must pass a test on reading instruction to work in California school districts.

What consequences followed this flurry of legislation? Unfortunately, there has been little advance of DISEC teaching of phonics rules. To the contrary, there are several signs that WL remains alive and well. For example:

1. Since there are no explicit penalties in the new reading instruction laws in California against individuals who flagrantly disobey them, WL proponents in school districts flout them without fear of punishment. A typical case comes from the San Diego schools. Shortly after becoming superintendent, Alan Bersin ordered elementary school teachers to use WL. "WL" is not mentioned in this directive. Nonetheless, it is clear to readers who know the literature that Bersin's mandate strongly respects it. His highly irregular practice of paying teachers during their summer vacation time to enroll in training in the use of WL pedagogy illustrates the extent of his commitment. On the other hand, Bersin brusquely overruled petitions from a cadre of San Diego teachers who protested his denial of their right to teach phonics information according to the experimental evidence.

2. In response to the new laws on students' reading development, the CDE issued a revised reading instruction curriculum to be implemented by school districts. This is a curious mixture of experimentally verified practices, and empirically invalidated ones. This compound of irreconcilable information is heralded by the CDE as a "balanced" approach.

3. One of the new reading laws in California provides funds for school districts to tell teachers the legal requirement to teach phonics in a DISEC manner. However, this statute often has been thwarted by school districts that take the money and use it to hire WL experts.

4. The new California law that requires candidates for teaching credentials to pass a standardized test on DISEC reading instruction has also been contravened. A critical analysis of this test published by the CDE reveals that the measure is riddled with compliments to WL concepts. Hence, a future teacher might pass by agreeing that phonics instruction need not be carried out in a DISEC manner.

Why Anti-Phonics Persists

The present discussion reveals the deep-seated resistance within California's education establishment toward phonics instruction and, conversely, the continuing loyalty to the WL approach. Numerous academic surveys of the relevant empirical findings on this issue, including the recently published report of the U.S National Reading Panel, concur that the fastest and most economical way to develop students' phonics knowledge is DISEC instruction. Despite the overwhelming preponderance of pertinent information, objections continue to be voiced in California's teaching community against that kind of instruction.

There are several reasons why this reckless attitude persists:

1. Once educators establish loyalty to an instructional innovation, they are loath to admit that it contains fatal flaws. Admission by educators that they have held erroneous views on teaching reading appears to be too painful for many of them to confess.

2. The myth persists in educational circles that DISEC teaching of phonics knowledge is inevitably inhumane. It regularly is dismissed as "drill and kill" teaching, meaning it is harsh and severe animal-like training that destroys students' motivation to learn.

3. Educators commonly congratulate themselves as being progressive, modernistic, on the cutting edge, ahead of the curve, etc., in their instructional practices. Since DISEC teaching of phonics information has a historical record, while WL is relatively new, the former is rejected on that score.

4. The leadership of the WL movement is charismatic, dedicated, vigorous, diligent, clever, self-assured, and not reluctant to use traditional propagandistic techniques (eg, the "bandwagon" appeal) in promoting its version of reading teaching. The kingpins of the WL movement have also captured America's influential reading-education periodicals which repeatedly proclaim the superiority of WL.

5. WL proposes that only teachers, and not standardized tests, can properly measure how well students have learned to read. This dogma is especially attractive to educators who understandably dislike being held directly responsible for their performance by external assessments.

6. The apparent simplicity of WL holds allure for teachers. As noted, the governing WL theory is that children best learn to read simply "by reading". Therefore, WL teachers do not have to master any intricate, specialized, technical knowledge about reading instruction.

7. Some educators may be attracted to WL by its radical social, economic, political, and cultural agenda. They would find attractive WL's proclamation that the ultimate purpose of WL teaching is to drastically change the status quo of the present capitalistic society, one that is said to be hopelessly stratified by gender, class, race, and a variety of other unworthy divisions.

Conclusions

The California scene illustrates how a democratic society's desire, as expressed through its elected representatives, to give its children phonics instruction in tax-supported schools in a DISEC manner can be readily circumvented by people hired to carry out the law. The California case thus is an object lesson in the need for elected representatives to install mechanisms to ensure that educational laws will be obeyed by educators.

People in democratic nations assume that educators employed to implement education laws have the scruples to do so. The recent events in California, however, are a warning to parents, taxpayers, and the general public that the powerful ideological commitment by educators to WL can override their personal integrity in this respect.

The lessons for the simplified spelling movement are clear. Even if the spelling of words is reformed in order to make it less difficult for children to learn to read, this progressive step toward facilitating students' literacy may be obstructed by the reluctance of educators to teach reformed sound correspondences in a DISEC manner. Before teachers subscribe to the principles of simplified spellings, they will have to concede the current scientific findings about how reading should be taught.

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NAEP = National Assessment of Educational Progress.

[Journal of the Simplified Spelling Society, 28, 2000/2 pp21–23]
[John J Reilly: see **Journals**]

7. The Political Context of Spelling Reform in the USA

John J. Reilly

John J. Reilly is a writer and editor (incl. American editor for *JSSS*) who lives in Jersey City, New Jersey, USA. He writes extensively on culture and politics. Mr. Reilly's most recent book is "Apocalypse & Future" (Xlbris). A large section devoted to spelling reform is located on his website.

Orthographic opportunities?

Most things you need to know are explained on "The Simpsons". Whenever the people of the mythical cartoon-city of Springfield vote for some collective folly, someone at the town meeting will ask, "Won't somebody please think of the children?" For better or worse, the major candidates in the recent US presidential elections seemed to think of little but the children. At any rate, that was what they preferred to talk about, often and at length. While neither major party advocated anything as ill-advised as that shoot-on-sight curfew that Springfield voted for in one episode, there was little in the political debate to suggest any openness to radically new approaches in promoting literacy. On the other hand, a review of the role of education in the 2000 election does suggest some institutional opportunities for making orthography an issue in the future.

Governor George W. Bush, the candidate of the Republican Party, made a particular point of talking about education and of being photographed in the act of visiting classrooms. The campaign of Vice President Al Gore of the Democratic Party did not neglect education, but his child-policy had a somewhat broader scope; universal medical coverage for all children was also a key theme. The platforms of the two chief parties had prominent sections devoted to education, with the chief emphasis given to primary education and pre-school programs. The relevant provisions went like this:

Platform of the Republican Party

Under the heading "Leave No American Behind," the Republican platform declared: "It's long past time to debate what works in education. The verdict is in, and our Republican governors provided the key testimony." Most American states have Republican governors, Texas not the least. Like George W. Bush, the governors have been emphasizing education policies of a back-to-basics sort for some years, and not without success. The platform outlined the usual mix: "strong parental involvement, excellent teachers, safe and orderly classrooms, high academic standards, and a commitment to teaching the basics — from an early start in phonics to mastery of computer technology...." Here is how the platform envisaged these things being applied nationally:

- Raise academic standards through increased local control and accountability to parents, shrinking a multitude of federal programs into five flexible grants in exchange for real, measured progress in student achievement.
- Assist states in closing the achievement gap and empower needy families to escape persistently failing schools by allowing federal dollars to follow their children to the school of their choice.
- Expand parental choice and encourage competition by providing parents with information on their child's school, increasing the number of charter schools, and expanding education savings accounts for use from kindergarten through college.

- Help states ensure school safety by letting children in dangerous schools transfer to schools that are safe for learning and by forcefully prosecuting youths who carry or use guns and the adults who provide them.
- Ensure that all children learn to read by reforming Head Start [a program for preschoolers] and by facilitating state reading initiatives that focus on scientifically based reading research..."

In this list, there are certain items that should make a spelling reformer's ears prick up. The endorsement of phonics is one (a particular favorite of the influential conservative think tank, the Heritage Foundation), as well as the call for "initiatives that focus on scientifically based reading research..." Less obviously relevant, but perhaps just as significant, is the emphasis on "charter schools" and on "allowing federal dollars to follow...children to the school of their [parents'] choice."

Charter schools are state funded, but with programs and curricula devised by parents or community groups, or even by educational entrepreneurs. This business about "federal dollars following the children" is a somewhat elliptical endorsement of the policy of giving vouchers to children for their educational expenses and letting them spend it at any school that will admit them, public or private. Either option leaves teachers much more latitude in deciding how to teach reading. We should note, though, that while teacher's unions can barely bring themselves to tolerate charter schools, the idea of vouchers going to private schools makes them livid.

Platform of the Democratic Party

This brings us to the Democrats. Under the caption "Investing in Americans" their platform said that "We cannot afford — materially or morally — to let another generation of American children pass through inadequate schools before we make needed changes that will save them from a lifetime of frustration and limited resources..." There then followed a list of things that should be done "by the end of the next presidential term." (The alarmingly specific deadline for accomplishing all the following good things is therefore January 20, 2005, 17:00 hrs. GMT:

- A fully qualified well-trained teacher in every classroom...and every teacher should pass a rigorous test to get there.
- Every failing school in America should be turned around or shut down and reopened under new public leadership.
- No high school student graduates unless they have mastered the basics of reading and math...
- Parents across the nation ought to be able to choose the best public school for their children.
- Every eighth grader in America should be computer literate.
- High-quality, affordable preschool should be fully available to every family...
- Every child should learn in a safe, modern classroom with the most up-to-date technology."
- The achievement gap between students of color and the rest of America's students should be eliminated."

The platform then goes on to promise that the "Democratic Party will triple the number of charter schools," while denouncing the voucher concept for sending "the public's hard-earned tax dollars to private schools with no accountability..."

Comparing the platforms
If these two programs seem to differ only in emphasis, that is because they do. As Ryan Lizza pointed out in the moderate-Left magazine, "The New Republic"(August 21), both programs are in fact based on a paper put out by the Progressive Policy Institute. This think tank is closely linked to the Democratic Leadership Council, the American incarnation of Third Way politics. President Clinton and Al Gore have been involved with the DLC since its inception in the 1980s. Senator Joseph Lieberman, the Democratic vice-presidential nominee, was its chairman at the time of his nomination.

There are significant differences in the amount of additional money the two parties proposed to spend on education, as well as how they proposed to spend it. The Republicans were contemplating spending $13.5 billion in federal money on their program over three years, mostly for vouchers and tax credits. The Democrats were talking about three times as much, with large, direct expenditures for school construction, smaller classes, more teacher training and universal preschooling. We may note that, whatever else the Democratic approach might achieve, it would certainly function as a jobs program for teachers. Another major feature of the Democratic approach that pleases the unions is the lack of teacher accountability for the performance of individual students.

Lizza suggested that the differences between the two sides is more apparent than real. The fact is, he says, that "many Democrats are sick to death of the unions' resistance to standards with teeth [and] many Republicans have given up on vouchers, which don't attract much public support." So, he says, no matter what happens in the election in November, "sensible Democrats and sensible Republicans may wake up from the spin and discover that they don't disagree on very much." This may well be true, and it may be important, but not for the reasons that at first appear.

Education as a federal non-issue
The reason we are talking about education at all is that the subject polls well with women. Specifically, according to political analysts, it polls with married, white women living in those Midwestern states that might swing to either party. It is hard to exaggerate its irrelevance to the official functions of the presidency, or even to the federal government as a whole. The *New York Times* ran a special education supplement (August 6) that dealt in large part with the issue's new political salience. James W. Guthrie, a professor of education at Vanderbilt University, was given the opportunity to explain the limited significance of federal education policy.

For one thing, though the US spends on the order of $700 billion on education every year, only 6% to 7% comes from the federal government, and much of that money is narrowly targeted to things like special education. The fact is that there is nothing in the federal Constitution about education. Almost all the taxing, spending and work in this area are done by the 50 separate state systems and their 15,000 local school districts. While noting that this degree of decentralization makes it hard to do anything at all on a national level, Guthrie also points out that "this complexity would also present an awesome obstacle to the brainwashing aspirations of any prospective despot." Let them who dream of a Neo-Orthographic Dictatorship take note.

What can be done at federal level?
Guthrie says that there are important things that can be done at the federal level. American schools improved conspicuously in the 1990s, he points out, in no small part because of the "Nation at Risk" report that was issued during the Reagan Administration. Though President Reagan did not have a particularly substantive education policy, he and his Secretary of Education, William Bennett, used the report to browbeat education officials at all levels into setting higher standards. Exhortation counts for a lot, particularly in a system where local boards of education are normally both powerful and elected.

Something else the federal government can do is research. Guthrie complains that there "is almost no powerful research conducted about education matters. America's philanthropic

foundations have virtually abandoned the field of serious inquiry in favor of supporting will-o'-the-wisp fads that ultimately only reinforce the status quo."

What hope for spelling reform?
What hope for spelling reform does this review give us? There is some. For instance, we see that there are literally thousands of venues in which to question the fundamental adequacy of the English orthographic system. On the other hand, the increasing emphasis on parental control does not necessarily bode well. Parents take poorly to having their children experimented on. Spelling reform may well sound like just another half-baked experiment, if it is proposed by the education establishment. Only if the parents raise the issue themselves can the fear of Newspeak be avoided. In any case, it is clear that the US education system could no more engineer a national orthographic revolution than a jellyfish could turn a somersault.

The opportunities are not only local: we have seen the influence that private think tanks can have on national policy. For that matter, if the federal government does in fact begin to subsidize more education research, there is no reason why some of the money should not go into grants to study the suitability of the orthographic system itself. Some comparative studies of the way that English and Spanish handle orthographic change might be well-received, for instance. Others will easily come to mind. Isn't this what we have graduate students for?

The chief problem that is faced by spelling reform in these opening years of the 21st century is that the idea is quite literally unthinkable to most English speakers. While it would be foolish, and maybe tyrannical, to hope to use the power of the state to impose a new spelling system on unwilling populations, politics can nevertheless play a key role, as one of several avenues through which people can be familiarized with the idea. The possibilities for politicizing spelling reform certainly exist. All that is lacking is a strategy.

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8. MONA CROSS: a tribute from Chris Jolly

Mona Cross, who died in September 2000 aged 95, was a committee member of the Society until the mid-1980s.

Mona Cross was a remarkable lady who helped hold the Society together through one of its more difficult times. Her slight appearance concealed a character of determination and great warmth. She had been a teacher and the headmistress of a primary school in her village of East Haddon in Northamptonshire. She became interested in spelling reform from using i.t.a. (initial teaching alphabet) at the school.

In the early 1980s the Society was at a low ebb, and the fact that it survived is in large measure due to Mona, and to Stanley Gibbs. Stanley tells of an AGM at that time with only four members present.

In the 1970s and 80s, Mona was variously Secretary of the Society, and Editor of the Newsletter (the main publication of the Society at the time). In these roles she was the link with the members. She wanted to see the Society thrive and to see its ideas for reform gain ground.

She did not harbour a scheme of her own, but instead put her efforts into publicity and the communication between members. Even though she had not been able to attend Society meetings for many years, she had continued her interest in the Society.

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[Zé do Rock: see **Journals**, **Newsletters**, **Personal Views,** **Media**, **Book**.]

9. The Spelling of Portuguese

Zé do Rock

Born and educated in Brazil, Zé do Rock's polyglot credentials are founded on his 11-year hitchhike around the world that inspired his orthographic travelogue *fom winde ferfeelt* (written in German, reviewed in ***JSSS 23***, Item 8) and his science-fiction book *UFO in der Küche* ('UFO in the Kitchen'). Amongst his publications since then has been 'An Excursion into Icelandic Orthography' (***JSSS 26***, Item 8). Most recently he monitored an SSS email discussion group in developing a new proposal for regularizing English spelling based on the currently dominant sound-symbol correspondences, and the present article represents the first published example of the system in use. See links.

Origins of portuguese

Nobody noes wat was the first language thay spoke in Portugal. Probbably sumtime in the past thay spoke sum kynd of "neandertalish", and the first language with a related language wich is stil alive was a sort of proto-basque. Later the celts came and finally the romans. Probbably for the first period of the roman domination the loer peeple stil spoke a celtic language but finally oanly latin was spoken. Probbably this latin the loer classes spoke was nevver pure, since the "barbarian" latin spoken in Portugal kept sum words from the old proto-basque and from celtic. Befor the "barbarian" latin was reccognized az portuguese, the peninsula was invaded by germanic tribes and receeved lots of germanic words, like *guarda* 'tu gard' (cf, *ward*), *guerra* (cf, *war*), *branco* 'wite' (cf, *blank*). Befor the locals recuvverd from that, the arabs conquerd the area. Arabic became the oficial language in Spain and Portugal, altho peeple kept speeking bad latin. The Reconquista pushing the arabs bak tu Africa began from the North, and it took a wile until the arabs, or at leest the moslems wer drivven out from Portugal. In the south a nue language had been born, calld moçarabe, a mixture of portuguese and arabic, wich eventually dyd out but stil gave the barbarian latin spoken in Portugal a good number of arabic words. In 1185 this language was oficialized az portuguese.

Evolution of portuguese spelling

Maybe becuz latin was the mane ritten language in moast of Europe in the Middle Ages, the portuguese didnt care much about their own language and the tendency was tu spel it acording tu the pronunciation. After that, with the decline of latin, the rize of the national languages, the invention of printing and evry printer wanting tu hav his "label" in the spelling, sumthing happend that was paraleld in menny european cuntries: the spelling started tu get mor complicated and based mor on etymology. But very offen, az in uther european languages, the etymology was rong. Menny Y's apeerd where there was no reezon for them, as in *my* (moddern *me* 'me'), *ty* (moddern *ti* 'thee'), *latym* (moddern *latim*), *dysse* (from latin *dixit* 'he sed'). Dubble consonants apeerd, as in *fallar* (from latin *fabulare* 'tu speek'), h's prolifferated, as in *h~uu* (tilde ritten over the U), later *hum* (from latin *unus* 'wun'), *hontem* (from latin *ad noctem* 'yesterday'), and menny wer inserted after consonants: *cathegoria*, *contheudo* 'contents', *sepulchro* 'grave'. Latin M or N, unless folloed by a vowel, became nasal as in french, and sumtimes it was reprezented by the tilde, '~', over the vowel, thus *tornã* 'thay turn'. But az there was no oficial spelling, moast words cood be spelt in sevral difrent ways, like *nam, non, não* 'no', 'not'.

Boath types of spelling livd tugether for neerly 4 centuries, the rather fonetic and the rather (sudo)-etymological, wich dusnt meen that sum peeple speld absolutely fonetically and uthers absolutely etymologically: usually peeple mixd boath, sum of them prefering the mor fonetic way and uthers prefering the mor etymological. But the "etymological" was the domminant stile.

The first portuguese spelling reform

Az time went by, a slite tendency tu spel mor and mor fonetically, or at leest mor logically, cood be observd. In 1911 the first reform was fixd in Portugal, and brazilians wer outraged, since Portugal hadnt askd Brazil. How cood Portugal alone decide wat the portuguese language shood look like, wen Brazil, tho not the cradle of the language, was much bigger and mor poppulus?

The first portuguese reform elimminated Y's, useless dubble consonants (oanly RR and SS remaned, since thay hav a fonetic function) and all the redundant meedial H's, wether etymological or not (*categoria, conteudo, teatro, ritmo* 'rithm'*, caos*, leeving just initial (always silent) H's (unless uzage had alreddy bannishd it az in *erva* 'herb'). The tilde, indicating nazalized vowels, was restricted tu the endings ÃO, ÃES, ÃOS, ÕES and stressd Ã; elsewair M or N wer uzed to indicate nazalization of the preceeding vowel as in *bebem* 'thay drink', *bom* 'good'. But the spelling receevd a load of nue axents tu make the stress cleer and for diferentiations between open and closed A, E and O, as in *se* (*/*sə*/* in Portugal and */*si*/* in Brazil 'if', 'self'), *sê* (pronounced as english *say* 'be!') and *sé* (*/*se*/* with E as in english *set* 'catheedral'). There was stil the grave axent, tu sho a contraction of the prepozition *a* 'tu' and the femminin deffinit article *a*, thus *Eu vou à cidade* 'I go tu the citty'. This grave axent didnt hav a fonetic function, since the À was just pronounced */*a*/*. And there was a dieresis ("umlaut") on U's wen pronounced after Q: *freqüente* (utherwize QU wood be pronounced */*ke*/*).

Az H remaned oanly in initial pozition, thay rote *humano*, but neggativ *inumano*. Silent letters disapeerd: *prompto, comptar* became *pronto, contar*. The spellings CE/CI from latin CI/TI (latin *initium, socialis*, Portuguese *inicio* 'beginning'*, social*) remaned CE/CI, wile SE/SI from latin SE/SI remaned SE/SI (Latin *sensus, controversia*, portuguese *senso* 'sense'*, controversia* 'controversy'). Latin SS remaned SS in portuguese, wile the SS */*s*/* from arabic and indian (ie, nativ brazilian) languages was spelt CE, CI or Ç (folloing uzage). For the sound of english SH there wer 2 spellings: CH for words having CL, FL, PL in latin (*chamar* 'to call'*, chama* 'flame'*, chover* 'to rane' from latin *clamare, flamma, pluere*); but when this sound came from arabic or indian languages it was spelt x (*oxalá* from arabic *Inshah Allah* 'so God wil'; *abacaxi* from guarani [nativ brazilian] 'pineapple').

Menny */*z*/* sounds wer respelt with S: *Brazil* became *Brasil*. Eeven surnames with -EZ wer respelt with -ES, so in Brasil there ar no *Rodriguez* or *Alvez*, oanly *Rodrigues* and *Alves* (unless thay'r of spanish desent). *Portuguez* changed tu *Português*, wich in my opinnion wasnt so good, since the final Z usually shoed that the last sillable was stressd, but final S forced them tu put a circumflex on the E to sho the stress. In sum uther cases where the Z shoed the stressd sillable, it remaned (eg, *rapaz* 'yung man', *nariz* 'noze'), altho *Paris* and *Jesus* didnt becum *Pariz, Jesuz*. It was argued that thees forms with z look tu strainge, forgetting that for an englishman *Londres* 'London' and for an italian *Milão* 'Milano' arnt much better.

Portuguese vs. brazilian spelling

Brazil remaned without an oficial orthografy eeven after the 1911 reform in Portugal, altho menny spellings had been simplifyd by uzage. In Portugal there wer sum ajustments in 1920

and 1929. In 1931 the Academia de Sciencias de Lisboa and the Academia Brasileira de Letras at last reechd an agreement. Brazil axepted a common spelling sistem for most but not all words. Sum simplifications wer restord tu their older form, like *inumano* tu *inhumano*. The word for 'muther', wich had been *mäe*, became *mäi*, wich coresponded tu the pronunciation, but sumhow this spelling got lost, since nowadays the spelling is *mäe* (pronounced mor or less /mɜiŋ/). In Portugal there ar menny words with open E or O befor M or N, wich nevver happens in Brazil, so that the portuguese spel *económico* (with stressd O as in english *boss*) wile brazilians rite *econômico* (with stressd o as in british english AW). There ar pairs of words where in Portugal wun has an axent just tu sho a difrence in sense, altho thay'r pronounced the same: *gostamos* 'we like' and *gostámos* 'we liked'. This difrence in spelling dusnt exist in Brazil. In coloquial brazilian there ar hardly enny conjugations ennymor (oanly the first person singular is cleerly difrent).

Neerly all apostrofies wer elimminated in 1931: *d'este* 'of this', *n'aquele* 'in that' became *deste, naquele*. The dygraf SC for /s/ was dropped where it has no function in enny of the variants (in portuguese sumtimes it is pronounced as english SH), thus *ciencia, cetro* (preeviusly *sciencia, sceptro* 'septer').

There wer stil considrable difrences between Portugal and Brazil, and in 1943 the two sides again tryd tu harmonize the 2 orthografies, but without suxess. In 1945 again: this time boath acaddemies sined the agreement, but the brazilian parlament rejected it. Brazilians had alreddy been riting *açäo* 'action', *diretor* for portuguese *acção, director* for quite a long time, and the portuguese didnt pronounce the C either; however, usually unstressd vowels ar a sort of shwa in Portugal, but not in thees cases, and the C shoes that. But an unstressd A in Brazil is an /a/, an unstressd E is an /e/ or an /i/ without the silent C influencing the pronunciation.

Anuther issue was the elimination of the diferential axent, uzed tu diferentiate words where the oanly difrence was a closed or open E or O. This is quite handy in sum cases, but in uther cases it is difficult: *todo* 'all', 'the whole' (masculin form) had no axent, but *tôda* (the femminin form of *todo*) had wun, becuz of a bird calld *toda*, with open O, which no wun had herd of exept sum ornithologists. So tu be able tu spel perfectly, the uzer was forced tu no the hole vocabbulary of the language. Oanly in a fue cases the axent was kept, az in the pair *pode/pôde* 'can/cood', with open or clozed o) or in *vem* 'he cums', *vêm* 'thay cum', *vêem* 'thay see' (the 3 words hav the same pronunciation), or in *pelo* 'by the', *pêlo* 'boddy hair', *pélo* 'i peel'. In Brazil *pelo* and *pêlo* ar pronounced the same (/pelu/), wile in Portugal *pelo* is pronounced /plu/ in normal speech.

In the end, oanly Portugal adopted this reform. Brazil decided tu elimminate the diferential axent in 1971 and axept quite a fue feetures Portugal had adopted in 1945, but it adopted sum uther chainges that again opend the gap between the tu cuntries: havving *só* 'oanly' (adjectiv) and *prá(c)tico* 'practical', the uzage was tu rite *sòmente* 'oanly' (adverb) and *prà(c)ticamente* 'practically'. Brazil elimminated this axent, since it didnt hav enny fonetic function in Brazil, but it did hav wun in Portugal, to make cleer that the unstressd sillables ar not shwas or a very week /u/ (in the case of *somente*, this spelling woodnt be pronounced *soment* but *sument* or *s'ment*.

Agreements and compromizes

In 1973 Portugal adopted sum of the chainges made in Brazil tu yeers befor. In 1975 and 1986 there wer uther atempts tu unify boath orthographies, without suxess. Howevver, in 1990 Portugal, Brazil and a delegation from the portuguese speeking cuntries in Africa sined a nue agreement, wich reduced the difrences between Brazil and Portugal tu 2% of the vocabbulary.

But then the guvverment of one african cuntry didnt aproov it, altho it was aproovd in the uther cuntries.

Wich wer the latest chainges? The letters k, w and y wer oficially introduced bak tu the language, altho in practice that didnt chainge ennything: there wer lonewords with k, w and y (*kilo*, *watt*, etc) befor, eeven if the portuguese alfabet oficially didnt hav them, and thay remaned. The "umlaut" (dieresis) was abollishd, wich makes spelling eezier (menny peeple didnt uze it ennyway) but reeding mor difficult for L2 lerners. Howevver, there arnt menny words where this ocurs. The meedial h in compound words was elimminated again: *inábil* 'unable' (despite *hábil*), *desarmonia* 'disharmony' (despite *harmonia*).

Silent consonants wer elimminated where thay'r not pronounced in enny of the cuntries (*diretor, batizar* 'director', 'baptize'), and if it is pronounced in wun but not in anuther of the cuntries, the spelling becums optional. Peeple can rite *facto* or *fato* 'fact', *recepção* or *receção* 'reception', az thay like, wichevver cuntry thay liv in (brazilians dont pronounce the C in *facto*, tho the portuguese do, while the brazilians pronounce the P in *recepção*, tho the portuguese dont). Certainly it will be a long time befor the portuguese rite *fato* since this meens 'a suit' in Portugal.

Today 98% of the words hav a uniform spelling, but there ar huge difrences in vocabbulary, manely becuz either the brazilians or the portuguese expeerienced a development wich the uther side of the Atlantic didnt, but also becuz of a considrable number of indian and african words in brazilian dialect, and later words of italian or german origin in suthern Brazil, especially in slang. Tecnical terms ar az difrent az Spanish and Polish (a slite exageration), and Brazil imports words without eeven dreeming of "portuguesizing" them, wile Portugal trys it very offen. Brazilians say *hovercraft*, but the portuguese say *aerodeslizador*. The computer mouse is *mouse* in Brazil, but *rato* in Portugal. Brazilians say *Internet* or *Net*, the portuguese say *Inter-rede*.

Sound-simbol corespondences
Pronunciation is very difrent tu. Wile brazilian sounds like a mix of french and italian, portuguese sounds like a slavic language, manely becuz moast vowels ar swalloed, the R's ar trild and the S wich is not folloed by a vowel is pronounced as english SH. Also the grammar is quite simplifyd in coloquial brazilian.

Portuguese spelling is not az bad az english or french, but not az good az spanish or italian.

The letter a has 2 vallues in Portugal (/a/ and mor or less /ə/, also stressd) and 4 vallues in Brazil (/a/, /ɜ/, /ai/ and /u/, but thay'r all lernable, since thay depend on the pozition in the word).

B is always /b/ in Portugal, but in wun case it is silent in Brazil (*também* 'also' is /təmeiŋ/).

The letter C is soft befor E and I (/s/), absolutely reggularly, wich is eezy for reeding but not for spelling, since /s/ can also be spelt SE and SI (the same problem az in english). The strings SA, SO, SU can also be spelt ÇA, ÇO, ÇU, exept word-initially

Unstressd DE and DI ar pronounced /dʒi/ (*cidade* 'citty' is pronounced /sidadʒi/, or just /sidadʒ/, in Brazil).

Unstressd E is /i/ (but offen silent) at the end of a word in Brazil, but in Portugal it is shwa in evry unstressd pozition (or silent): *beleza* 'buty' can be pronounced /bəlezə/ or /blez/.

The digraf EI is very offen pronounced as a simple vowel */e/* in Brazil, wile in Portugal it becums */əi/*.

The letter G is soft (*/ʒ/* az in french *général*) befor E and I (where soffening of G to */dʒ/* normally ocurs in english), so the spelling problem with G/J persists (do i rite *geografia* or *jeografia*?).

Initial H is silent.

In Portugal an L wich is not folloed by a vowel is dark az in english; in Brazil it is */w/*, so in *Brasil* it is pronounced */braziw/*.

Both M and N, when not folloed by consonants, ar nazals az in french (*bom* 'good', *canto* /kãtu/ 'song').

In Brazil, a final unstressd O is */u/*, or, as offen, silent (*Zé do Rock* is pronounced */ze du hok[i]/*). This is eezy tu spel, if the word is wel pronounced (with an unstressd */u/*). If u want it stressd, just rite U. If u want the O stressd, spel with Ô (*avô* 'grandfather', pronounced az in brittish english "AVAW"), or Ó (*avó* 'grandmuther', az in american english "AVAW". In Portugal all unstressd O's ar */u/* (or, as offen, silent). In Brazil the meedial unstressd o is sumtimes */o/*, sumtimes */u/*, without a rule for it. But meedial vowels ar rarely silent az in Portugal.

Wile portuguese R is trild, in Brazil the initial and dubble Rs ar pronounced */x/* az CH in scottish *loch* wen wel pronounced, but oanly as */h/* in normal speech), thus *Rio* is pronounced */hiw/*, mor or less as english *hew*. The final R in Brazil is silent in the infinnitiv (eg, *dar* /da/ 'tu giv', *comer* /ko'me/ 'tu eet'), and amung the loer classes, especially in the por reegions of the Northeest, in enny final pozition (eg, *popular* /popula/).

Intervocallic S is always */z/*, but this sound can be spelt with Z tu. In Portugal, S wich is not folloed by a vowel is pronounced as english SH, az Z is tu. In Portugal, for *os carros* 'the cars', u say */uʃkarr(u)ʃ/*, in coloquial brazilian /us cah(u)/ (the plural S is oanly pronounced in the article).

In Brazil unstressd TE and TI ar pronounced */tʃi/*, so that *abacate* 'avocado' is pronounced */aba'katʃ(i)/*.

The letter X has 4 vallues in Brazil: */ʃ/*, */ks/*, */s/*, */z/* (as in *xarope* 'sirrup'*, taxi, experimentar,.exame*), and 3 in Portugal: */ʃ/*, */ks/*, */z/*.

The letter Z is very trustworthy: it has always the sound */z/* — exept at the end of a word, where it has the sound */s/*. Exeptions to this exeption arize when the next word starts with a vowel or a voiced consonant, in wich case is pronounced */z/* again.

Verdict on portuguese spelling
In portuguese it is not suficient to lern all the rules: u hav tu lern the exeptions tu, becuz there ar mor exeptions than rules — exept for exeptions. Dont blame me, i didnt invent all this.

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[Journal of the Simplified Spelling Society, 28, 2000/2 pp27–32 in the print version]
[Allan Campbell: see **Journals**, **Newsletters**, **Spell4Literacy**

10. Lobbying in New Zealand
Allan Campbell

Allan Campbell, of Christchurch, New Zealand, is a retired proof-reader, part-time journalist, teacher, and educational bookseller. His interest in spelling change began in his teens. Before hearing of the SSS he lobbied — with minimal success — newspapers and advertisers to change -ISE suffixes to -IZE. In 1996 he and Cornell Kimball revived the SSS newsletter, which he now edits. In 1997–98 he was an SSS committee member.

1 First Contacts
I have been lobbying New Zealand ministers of education and opposition education spokespeople since late 1998 (see ***JSSS* 25**, Item 10). When the Labour-Alliance coalition government came into office a year later I sent a three-page letter, with some enclosures of newspaper articles, to Trevor Mallard, the new minister of education, and his three associates, as well as to Ian Ewen-Street, newly-elected and the Greens education spokesman, to whom I had not previously written.

After recounting reports and statistics on illiteracy I asked that the new government grab the initiative by inviting other English-language nations and international organizations using English to a conference to look at getting something under way. I said that could be a long-term aim. Short term, and as a gesture to the concept of change, it could agree to allowing 'American spellings' in schools.

At the same time (and unknown to me), the New Zealand Association for the Teaching of English (NZATE) (mainly high-school teachers) was itself looking at allowing 'American spellings'. When this was reported, the NZ Qualifications Authority, the statutory body overseeing educational standards, said it would monitor their decision; and the NZ Reading Association, mainly primary teachers, said it would also look at the proposal at its AGM. Phil Coogan, NZATE president, replied to a letter I sent him and in which I included a copy of the ***JSSS 21* article** 'American spelling in British schools?' (Item 12): 'Many thanks for sending me the article on simplified spelling which was most useful. If you are willing, I would be grateful if you would keep me informed about other material which might be useful in advancing this issue.'

[In 2000 he asked the Society for an article for the November issue of NZATE's journal, English in Aotearoa, which Chris Upward has provided.]

2 Parliamentary Select Committee
Then the parliamentary select committee on education and science announced at the start of March 2000 it would be looking at the teaching of reading, among other matters. This was in response to a request by a member of the committee, Donna Awatere Huata, of the Association of Consumers and Taxpayers (ACT), who, I later discovered, had visited the US and seen Governor George W Bush's 'accountability' system in Texas, where principals of schools can be sacked if their school does not reach the expected standard in literacy.

In previous correspondence with me, while she was in the Opposition, Dr Liz Gordon, now chair of the select committee (tho not of the subcommittee holding the inquiry), had expressed guarded support for the idea of change, but did not seem to think it was possible.

On behalf of the Society, and after consulting with the committee, I made a submission to this inquiry, again asking that the Government call an international conference of English-speaking nations and major international bodies to look at the issue of reviewing our spelling (see §5 below for text of Submission).

Tom Shanks (an SSS member from Oamaru, 250km south of Christchurch), new member Chrissy Parker, and I spoke to the subcommittee conducting the inquiry, in Christchurch on 18 August 2000. The hearing was shortened from the scheduled half hour as the committee was running late. They gave us an attentive hearing, and asked us to send them material showing how literacy acquisition was easier in languages with an easier spelling system. This I have done (see References at end for details).

Tom belongs to the same branch of the Labour Party as the minister of agriculture, and has been taking the opportunity to apprise him of our concerns, and has supplied him with a copy of the submission. I live just two blocks from one of the associate ministers of education, our local MP, and have had an informal discussion with her on the subject of spelling.

3 Follow-up communications
After we had spoken to the committee on the Society's submission, I sent copies to a number of bodies I had had previous contact with. The replies included:

- from the New Zealand Educational Institute Te Riu Roa (primary teachers' union):

  The National President has asked me to thank you for forwarding a copy of the Simplified Spelling Society's submission to the parliamentary select committee on Education and Science inquiry into reading.

  I found the information tracking spelling issues raised through the media and government committees very useful.

  I would be interested in the society's views of children using technological aids such as hand-held spellcheckers.

  Thank you for keeping NZEI Te Riu Roa informed.

  National Secretary

[I replied to this request:

  Basically, we are in favor of anything that eases children's ability to master literacy learning. However, we believe technological devices, such as the hand-held spellcheckers you mention, are dealing with symptoms only, and do not address an underlying problem, a problem that does not occur to anywhere near the same extent in languages with a transparent and predictable spelling system.]

- from the New Zealand Association for the Teaching of English:

Many thanks for sending me that lucid, compelling submission. I'll forward it on to the NZATE council. What chance of having it taken seriously? Best wishes

Phil Coogan, Director: English Online

- from the New Zealand Reading Association:

> Thank you for sending me a copy of your submission to the Select Committee on Reading. I have read it with interest… but fear your recommendation is hugely ambitious.
> Best wishes
> Libby Limbrick

I also sent a copy of the submission, along with two articles by Ken Spencer, to Mike Robson, managing director of Independent Newspapers Ltd, which has 10 dailies, the two Sunday newspapers, and a string of suburbans. I suggested that as newspapers would be the big beneficiaries if our campaign was successful, the company, and the Newspaper Proprietors Assn, might look at giving us moral support in any way they saw fit. Mr Robson replied:

Thank you for your letter of September 1 and I found your comments about Simplified Spelling most interesting.

> I do not believe Independent Newspapers Limited would be interested in any formal endorsement but if you wished to contact our individual editors I am sure they would treat your submissions on their merits as a news story.
> Yours sincerely
> Mike Robson

4 Replies from politicians
Some quotes from politicians' letters in reply to mine:

- from Trevor Mallard (Labour, now Minister of Education):

> 12 November 1998 (while in opposition): I certainly agree that change in spelling is desirable but it is a very long term project.
>
> 31 January 2000: I note that I currently have two pieces of correspondence about spelling: yours and one from another concerned person who is adamant that I must prevent any official sanctioning of American spelling. As I develop and refine the approaches the Government will take in tackling problems associated with literacy at all age levels, I will bear in mind the points you have made.

- from Ian Ewen-Street (Green Party, and a member of the select committee):

> 27 January 2000: You have raised some very valid concerns, and I agree we need to take a serious look at the factors contributing to our relatively low levels of literacy (including spelling, grammar, and of course reading habits). For instance, I am sure that television has a huge impact on literacy, and the pronunciation of words, as does advertising and the tendency to recreate words for the sake of branding. Perhaps you should contact the clerk for the education and science select committee at Parliament and ask about making a presentation to the committee about your concerns

[This was written before the reading inquiry was announced.]

- from Liz Gordon (Alliance, now chair of select committee on education and science):

3 November 1998 (while in Opposition): I have been puzzling about what to do with your letter. It is not the first time that I have considered this issue. The major barrier to the simplification of the language is, of course, the dual axes that uphold English as such a key world language: Britain, of course, and the US.

Over time I suspect things can be done, although getting agreement would be difficult. Can you imagine the cries from the purists? I know a couple of them — usually university types but not specializing in linguistics. This issue will not make it into our policy, Allan, although it is worth thinking about for a range of reasons — including the increasing gap between English-speaking countries.

1 April 1999: I suppose I can be classified as an incrementalist when it comes to language and language change, particularly because I can't see any other method, outside Big Brother kinds of tactics, can work to bring about change.

I have no objection to loosening the ties on language, so long as we don't confuse 'wider' with 'wrong'. For example, I am amenable nowadays to abolishing apostrophes because about one out of every two I see misused.

I'd like to learn more about what you think can be achieved by your short-term aim, which is to allow American spellings. At face value it might be thought that this would simply increase confusion. American spelling is a bit simpler than UK spelling, but only at the margins. I don't think any really difficult spelling is corrected in the US context. The majority of words that are not spelt as they sound are left totally untouched. So at present I am not convinced by the tactic, although I feel sure that your long-term aim will one day be met. I'd like to hear more.

- from Donna Awatere Huata (ACT), thru her secretary).

11 December 1998: Thank you for your letter regarding concerns over reading and writing skills of future New Zealanders. Thank you for the useful comments on spelling as a tool for reading and writing. Donna appreciates your support and understanding of the current situation. She is happy to note your advice.

5 Submission to Select Committee

Allan Campbell
New Zealand Representative, SSS
48 Orari street
Bexley, Christchurch 8007

Ms Clare Sullivan
Education and Science Select Committee Secretariat
Parliament House
Wellington
April 2000

Submission to Select Committee on Education and Science

[This submission follows the following spelling conventions: The best of current worldwide dictionary recognized forms; F for PH (where pronounced /f/); -OUGH adjustment]

The Society will present arguments showing the need for a vast improvement in the way English is spelt if the teaching of reading is to attain optimum levels of literacy; and asks the committee to be visionary and become the initiator of moves that will lead to a worldwide review of English spelling.

'Here is the News . . .'

Late 1997. In a review for the International Adult Literacy Survey of OECD nations, the New Zealand Ministry of Education (1997) finds 40% of employed people and 75% of unemployed are below the minimum level of literacy competence for everyday life and work. Workbase, the National Centre for Workplace Literacy and Language (1998), after working with the Ministry to make further data available from the survey, a year later says that this confirms the need for literacy (and numeracy) in the workplace. Findings from the survey prove literacy can no longer be just a third world issue, says Workbase's executive director.

April 1998. The US National Institute of Literacy study (1998) suggests about 40 to 44 million Americans struggle with literacy. At about the same time in Britain, a survey by the Basic Skills Agency (1997), a government-funded body, finds almost eight million people are so poor at reading and writing they cannot cope with the demands of modern life.

March 26, 1999. The Times (London). A preliminary report (final report OECD 2000) on the comparative percentages of adults at the lowest literacy level in nations or groups with European languages compiles this list: Poland 44%, Ireland 24, Britain 23, United States 22, Swiss German 19, New Zealand 20, Australia 17, Belgium 17, Canada 17, Swiss French 17, Germany 12, The Netherlands 10, Sweden 7. Six of the lowest nine are English-speaking.

August 10, 1999. ABC (Australia) Four Corners program. Dr David Kemp, Federal Minister for Education, expresses serious concern about literacy teaching and the illiteracy problem, including how to reach the most demoralized and most deprived.

October 1999. The Education Sub-committee of the House of Commons initiates an inquiry into early years education, partly to find why British children are behind their continental counterparts in literacy. [The Simplified Spelling Society [2000] is among those making a submission to this inquiry.]

November 12, 1999. TES Scotland (*Times Educational Supplement*, Scottish edition). A report on a survey in the Scottish Executive's Assessment of Achievement Programme carried out on mid and senior primary pupils and second-year secondary pupils reveals a poor grasp of even the most elementary skills in language. Attainment in writing causes particular concern.

February 17-18, 2000. At a National Forum of ALNARC (Adult Literacy and Numeracy Australian Research Consortium), it is reported that 62% of adult literacy students fail, and that 68% of youth workers fail to gain their own certificates. Most students drop out after the first or second session.

March 22, 2000. Radio New Zealand Checkpoint program. Mark Irwin (Employers and Manufacturers Association), commenting on the Government's new apprenticeship proposals, says a main problem with providing jobs for young people is their poor standards of literacy and numeracy. They often cannot read or understand written instructions relating to the work.

March 28, 2000. The New York Times. Once again mooring a traditionally Democratic issue to the agenda of his Republican presidential campaign, Gov George W Bush of Texas today

proposed a five-year, $5 billion program to address what he termed a national literacy crisis among children.

Teaching

1. Failure to reach goals in teaching children to read and write is not just a New Zealand problem. An unacceptable level of illiteracy is a common complaint among English-speaking peoples. It is an 'English disease'. Periodically, there are outcries from governments, parents, educationists, business people, that 'something must be done'. A commission/ taskforce/committee is set up to examine the matter and find ways of achieving better literacy levels. The focus is often short-term, and emfasizes teaching. Current classroom methods are usually seen as the culprit, and new ways are called for, with perhaps new teaching tools.
2. Sometimes the findings are accepted and put into practice. Fonics, so long the standard method (and still the standard with most other alfabetical languages), is found to be wanting. Irregular English spellings mean the choice of words in basic fonic readers has to be limited, resulting in stilted stories. 'Look and say' and 'whole language' in some jurisdictions, including New Zealand, supplants fonics teaching. But here we are again, still not achieving what we want.
3. In England the Government has now come down heavily in favor of fonics teaching, and has decreed a classroom 'Literacy Hour', resulting in some improvement in reading, tho not in writing. But the time requirement has cut into that allocated to other subjects ('curriculum overload'), when a knowledge-based economy is demanding the opposite.
4. This repetitious fiddling with teaching methods, training, and resources, will, in the Society's view, not solve the problem if the basic tool of literacy — spelling — is left in its parlous, antiquated, illogical state. It has not been reviewed in about 250 years, not since Dr Samuel Johnson published his dictionary. But even then his chosen spellings (from many alternatives) often were not consistent or fonemic, as he was keen not to obscure the origins of English words. Many of the word sounds represented have changed. Our spelling is now well past its use-by date. Other matters — measures, currency, education, defense, the courts, even voting systems — are occasionally, sometimes often, sometimes regularly, reviewed. Why not spelling?
5. In making this submission, the Society wishes to state very clearly it believes teachers, with the tools at their disposal, generally do a great job in teaching literacy. That the majority of New Zealand children can read and write as well as they do despite our difficult spelling is a tribute to the work of many parents and most teachers. That learners don't do better is not the teachers' fault.
6. Teachers face increasing numbers of children with poor language skills, children who don't read as much at home as used to be the case, and transient children who face special problems with literacy. Difficulties met by children at a crucial stage can make learning to read and write a bore and a chore. Those who do not have a good visual memory are particularly likely just to give up in the face of burdens such as those above. We suggest it is much more likely that unmotivated, reading-deprived children will break out of the cycle if they find that reading is a logical exercise they can manage. It is much less likely if reading repeatedly plays tricks on them.
7. That there may be better ways of teaching is not to doubt the ability of teachers. There are always better ways in fields of human endeavor.

Learning

8. In the past, inquiries such as this in all English-speaking countries have focused on improving teaching, rather than making learning easier. Easier learning lowers the need for exceptional teaching ability, ingenious teaching methods, expensive teaching aids, and much remedial work. A subject that is easy to learn can be picked up with far less teaching.
9. That the level of literacy achievement is not as high as desirable is, in the Society's view, beyond the control of teachers and the educational system generally if nothing is done to upgrade the fundamental tool of literacy in an alfabetical language — spelling — so that it works with learners rather than against them. We can develop and fine tune new teaching methods and resources, but if we don't repair and sharpen the broken tool we are using, we will keep on revisiting the problem.
10. Make the spelling logical and predictable — eg, *bred* (to eat), *ded*, *dred, hed, led* (metal), *red* (past tense, *read*), *sed, sted, tred* to match *bed, bled, fed, fled, shed, wed* — and we make learning to read and write so much easier and more likely to be achieved.
11. Leave it warped — eg (long E): *tree, tea, key, quay, me, chief, receive, people, ski, police, debris* — and we leave booby-traps to snare and land mines to maim the learner.
12. Recognizing and spelling the long E are two of the major confusions confronting a learner, whether a schoolchild or a foreigner wanting to master English as their world language. Others include doubling of consonants (*wholly, holly, holy, holiday*), heterografs — same sound, different spellings — (*maid/made; their/there; pair/pear/pare; site/sight/cite*), heterofones — same spelling, different sounds — (*lead* — to guide, metal; *read* — present, past tenses; *sow* — to plant seed, a female pig), silent letters (*write, right, wright, island, through*), silent (or magic) E (*save/have, give,* but *recipe*).
13. For young minds trying to make sense of the world as a whole, and not just reading and spelling, such contradictions are baffling. There are often no sensible explanations that teachers can provide for them. It comes down to having to suspend logic and to just memorize.
14. Some Society members have closely examined the spelling of 4664 common English words and found only 2110 that children can be taught to spell by the fonic method — the method which is sufficient to teach them in most other European languages. For the accurate spelling of at least the other 2554, one has to learn more than fonics, be this to decorate all Vs with an E, irrespective of pronunciation — *give, drive, live, have, shave* — or to watch for such traps as *through, break, yacht*.
15. Children cannot decode such words by simply using their fonic knowledge. They have to guess substantial parts of them by intelligently using fonics and clues from context. For large numbers of English words, learning to read by just sounding out letters and joining them into words, as happens in most European languages — and Maori — is simply impossible. This aspect of English spelling makes learning to read English more difficult. It results in our having to devise complex teaching strategies and methods which many other languages find unnecessary.
16. The report of the Government Literacy Taskforce (of practitioners) in March 1999 made a number of recommendations on teaching, but virtually ignored spelling. However, the Literacy Experts Group (of academics), set up to support the taskforce with theoretical input, encouraged the development of fonological awareness, but did not go as far as to suggest anything be done to review and repair spelling. Which is understandable, because even if they had the vision, and thought it a good idea, they would probably have seen it as outside their domain.
17. Unless we do have the vision and move outside the square to look at the bigger picture, we are doomed to keep on searching for better ways to teach reading and writing, while failing to deal with a core learning problem.
18. This is our opportunity to break out and lead the way.

19. As a language with an alfabetical writing system, English uses an assortment of letter symbols representing sounds to form written word shapes or 'pictures', in contrast to logografic languages, which use shapes that are not necessarily related to sounds. The combinations of letter symbols — spelling — should enable us to decode the words we see in front of us, and encode words we wish to write.
20. While English has many strong points in its favor as a language suitable for use for international communication, it is acknowledged as one of the worst languages for spelling. An amalgam of words from many disparate tongues with differing patterns, it has not done anything deliberately to integrate new words in a systematic way. For instance, some retain their spelling but change their pronunciation — *champagne* — while some retain both — *depot*. This has been going on for centuries, and the confusion is manifest. About half of English words have a fonetically illogical component.
21. If the spelling were consistent, if a given combination of letters could be confidently relied on in decoding (reading), and if a given sound could be confidently encoded in writing, much of the difficulty teachers face in reading and writing instruction would disappear. We would not need high degrees of teaching ability and smart equipment to aid literacy learning. We would not have the same need for remedial work. Much class time would be saved, to be used for other teaching.

Making a start

22. The Society acknowledges that the huge problem our spelling poses cannot be fixed overnight. It is so complex that almost everyone looking at it with a view to solving it comes up with a different 'answer'. A solution will need much compromise. It will need insight from professionals — linguists, teachers, publishers, lexicografers, writers, marketers. It will also need down-to-earth, streetwise input from laypeople.
23. It will need international co-operation. English's world status is at once a blessing and a difficulty. It allows us to communicate with more nations and peoples than does any other.
24. Because we have developed differing national and provincial dialects, a purely fonetic response is not possible. However, some sounds (mostly consonants) can be faithfully represented for all accents. Most sounds can be accurately represented for most accents in most words. But there will be exceptions. Despite this restriction, there is a wide field where improvement is possible.
25. Other languages review and modernize their spellings from time to time (German has just done so). Tho English's greater international status adds difficulties to this process, overcoming them should not be beyond our capabilities.
26. In languages with almost fully systematic spellings, eg, Finnish, Italian, and Czech, children are taught to read by fonics in the first year or so, and because of the regularity of the spellings, they have little need for further tuition. They often then teach themselves. A study by Gwenllian Thorstad, a Society member, in 1991 found seven-year-old Italian children outperforming 11-year-old British children in comparable reading and spelling tests. As long as we anglofones continue to resist spelling change we will find ourselves continuing to tinker with symptoms rather than causes of illiteracy. We will remain near the bottom of the developed nations' literacy league despite our continuing to invest more time, effort, and money into the teaching of reading and writing.
27. People often concede that 'well, yes, our spelling is a bit weird and something should be done about it', but no one says 'let's start'.
28. If it doesn't start, it doesn't happen.
29. Now is the time to start.
30. Any benefits for New Zealand in changing on its own would be offset by complications to our written communication with the rest of the English-speaking world. But New Zealand has often led the world in social change. It would not be out of character for us again to show the way. We can invite other English-speaking nations, encourage them, and lead

them into committing to change. A change that would reduce enormously the problems that we currently have with the teaching of reading and writing. Future generations will thank us.

Proposal

31. The Society therefore asks this committee to recommend to the Government that it initiate a world-wide review of English spelling by inviting other nations and international organizations using English as their principal language, and possibly some nations which use it as their second and international language, to meet to begin a process of regularizing its spelling.
32. At this stage we do not suggest how change may be designed and implemented. That would be for whatever body the proposed international conference might set up and charge with the task. If asked, the Society would be only too pleased to help this body in any way it could.

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US National Institute for Literacy, Washington DC (1998) The State of Literacy in America: Estimates at the local, state, and national levels.

Workbase, The National Centre for Workplace Literacy and Language, Auckland (November 1998) *Literacy Skills and the New Zealand Workforce*.

The material subsequently submitted to the New Zealand sub-committee (see §2 above) consisted of the following:

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— (2000) Most illiterate English children would succeed in other languages. ***Simpl Speling*, SS12, July 2000.** Item 7.

Thorstad, Gwenllian (1991) The effect of orthography on the acquisition of literacy skills. *British Journal of Psychology* (1991, 2, pp 527–37). See **Books & Papers**.

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[Journal of the Simplified Spelling Society, 28, 2002/2 p32 in the print version]

11. LETTERS

Letters are welcomed on any matters raised by items appearing in *JSSS*, or on any observations or experiences relating to spelling that readers may wish to report.

Anglo-American variants

When it comes to choosing between UK and US spellings, I'm not sure we should rush to simplify spellings which have not yet been simplified on the other side of the Atlantic. For example, Americans still prefer *prophecy* as a noun — and while it might be better if everyone always wrote *prophesy*, perhaps we should continue to distinguish the noun and verb. I also think the Americans are right to use the spelling of *practice* in all cases, largely because the word *notice* has the same -TICE ending.

The American spellings I'm most keen to see in British English are those related to biology, and I wonder whether the SSS has ever tried to persuade the British Medical Association to use forms like *anesthetic* and *hemoglobin*. I think it would be worth mentioning that *fetus* is acceptable in the UK and so there's no reason why all the other US variants can't be as well when it involves omitting silent A or O (e.g. *diarrhea*, *gynecology* and *orthopedic*). I would prefer *tumor*, but I feel this belongs in a different category with words such as *humor/humour* and *labor/labour*).

I have some reservations as to whether we should follow American *acknowledgment* and *judgment*, however. Retaining the E when their base words (*acknowledge* and *judge*) have it could well make things easier for the average person. In fact, *acknowledgement* and *judgement* are such common spelling "mistakes" in America that they are now being accepted. Also, the E in *management* has yet to be dropped in the States, and if all three words continue to be spelt with an E it might help to maintain some consistency.
Jon Free, Ipswich, England

Danish Ø

In his article on Finnish (***JSSS 25,*** Item 3), Colin Davies suggests, with reference to a symbol for the schwa: "If we are going for fonetic spelling, we had better find a substitute for Ö that is quicker to write, and has no dots on top."
In his article "Spelling Reform — arguments against and for" (*JSSS 27*, p19), Justin Rye states " One new vowel would be handy; I'd go for Scandinavian (Danish, actually) slashed ø as in *Bjørk*."

The SSS Committee has ruled that it will not consider further systems in the Personal View series which involve diacritic symbols.

I suggest we might adopt Danish Ø as a 27th letter, to represent the ER sound as in *fir, fur, heard, were, meter,* which would become *før, før, hørd, wør, metør*. A large number of English words could be regularized by its adoption. I am not sure that it should be adopted for schwa, and if it was to be, it should be at a later stage. Perhaps even Ø should come as a second stage?

Ø does not stick out in lines of type like Ö and Ö do. The letter can be produced on a typewriter by typing /-backspace-O. It can be written quickly by completing the circle and making a downstroke. Finally, even the traditionalists ought to be able to accept that English owes something to Danish as one of its predecessor languages.
Ted Relton, Ilford, England

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12. JSSS 28 2002/2: Literature Received

In the past 6 months *JSSS* has received the following publications:

1 *eda News*, newsletter of the European Dyslexia Association, Vol.6 No.2, August 2000.
2 *English*, the Journal of the English Association, Vol.49, No.194, Summer 2000; No.195, Autumn 2000.
3 *English Association Newsletter*, No.164, Summer 2000.
4 *English Today*, No.63, July 2000; No.64, October 2000.
6 *QUEST*, the Journal of the Queen's English Society, No.76, September 2000.
7 *Reading*, Vol.34, No.2, July 2000; Vol.34, No.3, November 2000; from UK Reading Association.
8 *Rechtschreibung*, newsletter of the *Bund für vereinfachte rechtschreibung* (Federation for simplified spelling), Zürich, No.181, June 2000.
9 *Sprachreport*, from the Institut für deutsche Sprache, Mannheim, Germany, 2/2000, 3/2000.