

Handbook of Research on Educational Communications and Technology.

Chapter 5.

Cognitive Perspectives in Psychology.

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I. INTRODUCTION

Caveat Lector.

This is a revision of the chapter on the same topic that appeared in the first edition of the Handbook, published in 1995. In the intervening years, a great many changes have occurred in cognitive theory, and its perceived relevance to Education has been challenged. As a participant in, and indeed as a promulgator of some of those changes and challenges, my own ideas and opinions have changed significantly since writing the earlier chapter. They continue to change – the topics are rapidly-moving targets. This has presented me with a dilemma: whether simply to update the earlier chapter by adding selectively from the last half dozen years' research in cognitive psychology and risk appearing to promote ideas that some now see as irrelevant to the study and practice of Educational Technology; or to throw out everything from the original chapter and start from scratch. I decided to compromise.

This chapter consists of the same content, updated and slightly abbreviated, that was in the first edition of the Handbook, focusing research in cognitive theory up until the mid 'nineties. I have added sections that present and discuss the reasons for current dissatisfaction, among some educators, with these traditional views of cognition. And I have added sections that describe recent views, particularly of mental representation and cognitive processing, which are different from the more traditional views. There are three reasons for my decision. First, the reader of a Handbook like this needs to consider the historical context within which current theory has developed, even when that theory has emerged from the rejection, not the extension, of some earlier ideas. Second, recent collaborations with colleagues in Cognitive Psychology, Computer Science and Cognitive Neuroscience have confirmed for me that these disciplines, which I remain convinced are centrally relevant to research in Educational Technology, still operate largely within the more traditional view of cognition. Third, a great deal of the research and of the practice of Educational Technology continues to operate within the traditional framework, and continues to benefit from it. I also note that other chapters in the Handbook deal more thoroughly, and more ably, with the newer views. So, if readers find this chapter somewhat "old fashioned" in places, I am nonetheless confident that within the view of our discipline offered by the Handbook *in its entirety*, this chapter still has an important place.

Basic Issues.

Over the last few years, education scholars have grown increasingly dissatisfied with the "standard view" of cognitive theory. The "standard view" is that people represent information in their minds as single or aggregated sets of symbols, and that cognitive activity consists of operating on these symbols by applying to them learned plans, or algorithms. This view reflects the analogy that the brain works in the same way as a computer (Boden, 1988; Johnson-Laird, 1988), a view that inspired, and was perpetuated by, several decades of research and development in artificial intelligence.

This computational view of cognition is based on several assumptions: 1) That there is some direct relationship, or "mapping", between internal representations and the world outside, and that this mapping includes representations that are analogous to objects and events in the real world, i.e. mental images look to the mind's eye like the perceived phenomena from which they were first

created (Kosslyn, 1985). 2) There is both a physical and phenomenological separation between the mental and the physical world, i.e. perception of the world translates objects and events into representations that mental operations can work on, and the altered representations are in turn translated into behaviors and their outcomes that are observable in the external world. 3) This separation applies to the timing as well as to the location of cognitive action. Clark (1997, p. 105) calls the way that traditional cognitive theory conceives of the interaction between learner and environment "catch and toss". Information is "caught" from the environment, processed, and "tossed" back without coordination with or sensitivity to the real dynamics of the interaction. 4) Internal representations are idiosyncratic and only partially accurate. However, there is a standard and stable world "out there" towards which experience and education will slowly lead us, i.e. there are correct answers to questions about the world and correct solutions to the problems that it presents.

Some scholars' dissatisfaction with the computational view of cognition arose from evidence that suggested these assumptions might be wrong. 1) Evidence from Biology and the Neurosciences, which we will examine in more detail later, shows that the central nervous system is informationally closed, and that cognitive activity is prompted by perturbations in the environment that are not represented in any analogous way in the mind (Maturana & Varela, 1980, 1992; Bickhard, 2000). 2) There is evidence that cognitive activity is not separate from the context in which it occurs (Lave, 1988; Suchman, 1987). Thinking, learning and acting are embedded in an environment to which we are tightly and dynamically coupled and which has a profound influence on what we think and do. What is more, evidence from the study of how we use language (Lakoff & Johnson, 1980) and our bodies (Clark, 1997; Varela et al., 1991) suggests that cognitive activity extends beyond our brains to the rest of our bodies, not just to the environment. Many metaphorical expressions in our language make reference to our bodies. We "have a hand" in an activity. We "look up to" someone. Our gestures help us think (see the review by Roth [2002]) and the proprioceptive feedback we get from immediate interaction with the environment is an important part of thinking and learning. 3) Scholars have argued that cognitive activity results from the dynamic interaction between two complex systems – a person and the environment. Indeed, it is sometimes useful to think of the two (person and environment) acting as one tightly-coupled system rather than as two interacting but separate entities (Beer, 1995; Roth, 1999). The dynamics of the activity are crucial to an understanding of cognitive processes, which can be described using the tools of Dynamical System Theory (Port & Van Gelder, 1995a). 4) Finally, scholars have made persuasive arguments that the value of the knowledge we build lies not in its closeness to any ideal or correct understanding of the external world, but to how it suits our own individual needs and guides our own individual actions. This pragmatic view of what is called "Constructivism" finds its clearest expression in accounts of individual (Winn & Windschitl, 2002) and situated (Lave & Wenger, 1991) problem solving. (The danger that this way of thinking leads inevitably to solipsism is effectively dispelled by Maturana & Varela [1992], pp. 133-137).

The constructivists were among the first to propose an alternative conceptual framework to the computational view of cognition. For educational technologists, the issues involved are clearly laid out by Duffy & Jonassen (1992) & Duffy, Lowyck & Jonassen (1993). Applications of constructivist ideas to learning that is supported by technology are provided by many authors, including Cognition and Technology Group at Vanderbilt (2000), Jonassen (2000), and White & Frederiksen (1998). Briefly, understanding is constructed by students, not received in messages from the outside simply to be encoded, remembered and recalled. How knowledge is constructed

and with what results depends far more on a student's history of adaptations to the environment (Maturana & Varela, 1989) than on particular environmental events. Therefore, learning is best explained in terms of the student's evolved understanding and valued on that criterion rather than on the basis of objective tests.

However, constructivism, in its most radical forms, has been challenged in its turn for being unscientific (Sokal & Briquemont, 1998), even anti-intellectual (Cromer, 1997; Dawkins, 1997). There is indeed an attitude of "anything goes" in some post-modern educational research. If you start from the premise that anything that the student constructs must be valued, then conceptions of how the world works may be created that are so egregious as to do the student intellectual harm. It appears that, for some, the move away from the computational view of cognition has also been away from learning and cognition, as the central focus of educational research, in *any* form. This is understandable. If the knowledge we construct depends almost entirely on our unique personal experiences with the environment, then it is natural to try to explain learning and to prescribe learning strategies by focusing on the environmental factors that influence learning, rather than on the mechanisms of learning themselves. Skimming the tables of contents of educational books and journals over the last fifteen years will show a decline in the number of articles devoted to the mechanisms of learning and an increase in the number devoted to environmental factors, such as poverty, ethnicity, the quality of schools, and so on. This research has made an important contribution to our understanding and to the practice of education. However, the neglect of cognition has left a gap at the core that must be filled. This need has been recognized, to some extent, in a recent report from the National Research Council (Shavelson & Towne, 2002), which argues that education must be based on good science.

There are, of course, frameworks other than constructivism, that are more centrally focused on cognition, within which to study and describe learning. These are becoming visible now in the literature. What is more, some provide persuasive new accounts of mental representation and cognitive processes. Our conceptual frameworks for research in educational technology must make room for these accounts. For convenience, I will place them into four categories: systems theoretical frameworks, biological frameworks, approaches based on cognitive neuroscience, and neural networks. Of course, the distinctions among these categories often blur. For example, neuroscientists sometimes use system theory to describe cognition.

System theory. System theory has served educational technology for a long time and in different guises (Heinich, 1970; Pask, 1975, 1984; Scott, 2001; Winn, 1975). It offers a way to describe learning that is more focused on cognition while avoiding some of the problems confronting those seeking biological or neurological accounts that, until recently, appeared largely intractable. A system-theoretic view of cognition is based on the assumption that both learners and learning environments are complex collections of interacting variables. The learner and the environment have mutual influences on each other. The interactions are dynamic, and do not stand still for scrutiny by researchers. And to complicate matters, the interactions are often nonlinear. This means that effects cannot be described by simple addition of causes, since what is cause and what is effect is not always clear. Changes in learners and their environments can be expressed by applying the mathematical techniques of Dynamics (see relevant chapters in Port & Van Gelder, 1995b). In practice, the systems of differential equations that describe these interactions are often unsolvable. However, graphical methods (Abraham & Shaw, 1992) provide techniques for side-stepping the calculus and allow researchers to gain considerable insight about these interacting

systems. The accounts of cognition that arise from Dynamical System Theory are still abstractions from direct accounts, such as those from biology or cognitive neuroscience. However, they are closer to a description of systemic changes in understanding and in the processes that bring understanding about than accounts based on the computational or constructivist views.

Biological frameworks. Thinking about cognition from the standpoint of Biology reminds us that we are, after all, living beings who obey biological laws and operate through biological processes. I know this position is offensive to some. However, I find the arguments on this point, put forward by Dawkins (1989), Dennett (1995) and Pinker (1997), among others, to be compelling and highly relevant. This approach to our topic raises three important points. First, what we call "mind" is an emergent property of our physical brains, not something that has divine or magical provenance and properties. This opens the way for making a strong case that neuroscience *is* relevant to education. Second, cognition is embodied in our physical forms (Varela et al., 1991; Clark, 1997; Kelso, 1999). This implies two further things. What we can perceive directly about the environment, without the assistance of devices that augment our perceptual capacities, and therefore the understanding we can construct directly from it, are very limited – to visible light, to a small range of audio frequencies, and so on (Nagel, 1974; Winn & Windschitl, 2001b). Also, we use our bodies as tools for thinking – from counting on our fingers to using bodily movement in virtual environments to help us solve problems (Dede et al., 1996; Gabert, 2001). Third, and perhaps most important, the biological view helps us think of learning as *adaptation to an environment* (Holland, 1992, 1995). Technology has advanced to the point where we can construct complete environments within which students can learn. This important idea is developed later.

Cognitive neuroscience. The human brain has been called the most complex object in the universe. Only recently have we been able to announce, with any confidence, that some day we will understand how it works (although Pinker [1997] holds a less optimistic position). In the meantime, we are getting closer to the point where we will be able to explain, in general terms, how learning takes place. Such phenomena as memory (Baddeley, 2000; Tulving, 2000), imagery (Farah, 2001; Kosslyn & Thompson., 2000), vision (Hubel, 2000), implicit learning (Knowlton & Squire, 1996; Liu, 2002), and many aspects of language (Berninger & Richards, 2002) are now routinely discussed in terms of neurological processes. While much of the research in cognitive neuroscience is based on clinical work, meaning that data come from people with abnormal or damaged brains, recent developments in non-intrusive brain-monitoring technologies, such as fMRI, are beginning to produce data from normal brains. This recent work is relevant to cognitive theory in two ways. First, it lets us reject, once and for all, the unfounded and often rather odd views about the brain that have found their way into educational literature and practice. For example, there is no evidence from neuroscience that some people are "right brained", and some "left brained". Nor is there neurological evidence for the existence of learning styles (Berninger & Richards, 2002). These may be metaphors for observed human behaviors. But they are erroneously attributed to basic neural mechanisms. Second, research in cognitive neuroscience provides credible and empirically-validated accounts of how cognition, and the behavior it engenders, change as a result of a person's interaction with the environment. Learning causes detectable physical changes to the central nervous system that result from adaptation to the environment, and that change the ways in which we adapt to it in the future (Markowitsch, 2000. See also Cisek [1999] pp. 132-134 for an account of how the brain exerts control over a person's state in their environment).

Neural networks. This fourth framework within which to think about cognition crosses several of these categories. Neural networks are implemented as computer programs which, like people, can learn through iterative adaptation to input and can solve novel problems by recognizing their similarity to problems they already know how to solve. Neural network theory takes its primary metaphor from neuroscience – that even the most complex cognitive activity is an emergent property of the coordinated activation of networks of many atomic units (neurons) that can exist in only two states, on or off. (See McClelland & Rumelhart [1986, 1988], Rumelhart & McClelland [1986] for conceptual and technical accounts.) The complexity and dynamics of networks reflects many of the characteristics of system theory, and research into networks borrows from systems analysis techniques. Neural networks also transcend the representation-computation distinction, which is fundamental to some views of cognition and to which we return later. Networks represent information through the way their units are connected. But the changes in these connections are themselves the processes by which learning takes place. What is known and the ways knowledge is changed are one and the same. Neural networks have been most successful at emulating low-level cognitive processes, such as letter and word recognition. Higher level operations require more abstract, more symbolic, modes of operation, and symbols are now thought to be compatible with network architectures (Holyoak & Hummel, 2000).

What has all this go to do with cognition and, particularly, with its relationship to educational technology? The rest of this chapter seeks answers to this question. It begins with a brief history of the precursors of cognitive theory and a short account of cognitive theory's ascendancy. It then presents examples of research and theory from the traditional cognitive perspective. This view is still quite pervasive, and the most recent research suggests that it might not be as far off the mark as we recently suspected. The chapter therefore examines traditional research on mental representation and mental processes. In each of these two sections, it presents the major findings from research and the key objections to the traditional tenets of cognitive theory. It then discusses recent alternative views, based roughly on the four frameworks we have just examined. The chapter concludes by looking more closely at how traditional and more recent views of cognition can inform and guide educational technology research and practice.

II. HISTORICAL OVERVIEW.

Most readers will already know that cognitive theory came into its own as an extension of (some would say a replacement of) behavioral theory. However, many of the tenets of cognitive theory are not new and date back to the very beginnings of psychology as an autonomous discipline in the late nineteenth century. We therefore begin with a brief discussion of the new science of mind and of Gestalt theory before turning to the story of cognitive psychology's reaction to behaviorism.

The beginnings: A science of mind.

One of the major forces that helped Psychology emerge as a discipline distinct from Philosophy, at the end of the nineteenth century, was the work of the German psychologist, Wundt (Boring, 1950). Wundt made two significant contributions, one conceptual and the other methodological. First, he clarified the boundaries of the new discipline. Psychology was the study of the inner world, not the outer world, which was the domain of Physics. And the study of the inner world was to be the study of thought, or mind, not of the physical body, which was the domain of Physiology. Wundt's methodological contribution was the development of introspection as a means for studying the mind. Physics and Physiology deal with phenomena that are objectively present and therefore directly observable and measurable. Thought is both highly subjective and intangible. Therefore, Wundt proposed, the only access to it was through the direct examination of one's own thoughts through introspection. Wundt developed a program of research that extended over many decades and attracted adherents from laboratories in many countries. Typically, his experimental tasks were simple -- pressing buttons, watching displays and the like. The data of greatest interest were the descriptions his subjects gave of what they were thinking as they performed the tasks.

On the face of it, Wundt's approach was very sensible. You learn best about things by studying them directly. The only direct route to thought is via a subject's description of his own thinking. There is a problem, however. Introspection lacks objectivity. Does the act of thinking about thinking interfere with and change the thinking that one is interested in studying? Perhaps. But the same general access route to cognitive processes is used today in developing think-aloud protocols (Ericsson & Simon, 1984), obtained while subjects perform natural or experimental tasks. The method is respected, judged to be valid if properly applied, and essential to the study of thought and behavior in the real world or in simulations of it.

Gestalt psychology

The word "Gestalt" is a German noun, meaning both "shape" or "form" and "entity" or "individual" (Hartmann, 1935). Gestalt psychology is the study of how people see and understand the relation of the whole to the parts that make it up. Unlike much of science, which analyzes wholes to seek explanations about how they work in their parts, gestalt psychology looks at the parts in terms of the wholes that contain them. Thus, wholes are greater than the sum of their parts, and the nature of parts is determined by the wholes to which they belong Wertheimer (1924). Gestalt psychologists therefore account for behavior in terms of complete phenomena, which they explain as arising from such mechanisms as "insight". We see our world in large phenomenological units and act accordingly.

One of the best illustrations of the whole being different from the sum of the parts is provided in a musical example. If a melody is played on an instrument, it may be learned and later recognized. If the melody is played again, but this time in another key, it is still recognizable. However, if the same notes are played in a different sequence, the listener will not detect any similarity between the first and the second melody. Based on the ability of a person to recognize and even reproduce a melody (whole Gestalt) in a key different from the original one, and on their inability to recognize the individual notes (parts) in a different sequence, it is clear that, "The totals themselves, then, must be different entities than the sums of their parts. In other words, the 'Gestaltqualität' ('form quality') or whole has been reproduced: the elements or parts have not." (Hartmann, 1935).

The central tenet of Gestalt theory -- that our perception and understanding of objects and events in the world depends upon the appearance and actions of whole objects not of their individual parts -- has had some influence on research in Educational Technology. The key to that influence are the well-known Gestalt laws of perceptual organization, codified by Wertheimer (1938). These include the principles of "good figure", "figure-ground separation" and "continuity". These laws formed the basis for a considerable number of message design principles (Fleming & Levie, 1978, 1993), in which Gestalt theory about how we perceive and organize information that we see is used in prescriptive recommendations about how to present information on the page or screen. A similar approach to what we hear is taken by Hereford & Winn, (1994).

More broadly, the influence of Gestalt theory is evident in much of what has been written about visual literacy. In this regard, Arnheim's book *Visual Thinking* (1969) is a key work. It was widely read and cited by scholars of visual literacy and proved influential in the development of that field.

Finally, it is important to note a more recent renewal of interest in Gestalt theory (Henle, 1987; Epstein, 1988). The Gestalt psychologists provided little empirical evidence for their laws of perceptual organization beyond everyday experience of their effects. Using newer techniques that allow experimental study of perceptual organization, researchers (Pomerantz, 1986; Rock, 1986) have provided explanations for how Gestalt principles work. The effects of such stimulus features as symmetry on perceptual organization have been explained in terms of the "emergent properties" (Rock, 1986) of what we see in the world around us. We see a triangle as a triangle not as three lines and three angles. This experience arises from the closeness (indeed the connection) of the ends of the three sides of the triangle. Emergent properties are the same as the Gestaltist's "whole" that has features all its own that are, indeed, greater than the sum of the parts.

The rise of cognitive psychology

Behavioral theory is described in detail elsewhere in this Handbook. Suffice it to say here that behaviorism embodies two of the key principles of positivism -- that our knowledge of the world can only evolve from the observation of objective facts and phenomena; and that theory can only be built by applying this observation in experiments where the experimenter manipulates only one or two factors at a time. The first of these principles therefore banned from behavioral psychology unobservable mental states, images, insights and Gestalts. The second principle banned research methods that involved the subjective techniques of introspection, phenomenology and the drawing of inferences from observation rather than from objective measurement. Ryle's (1949)

relegation of the concept of "mind" to the status of "the ghost in the machine", both unbidden and unnecessary for a scientific account of human activity, captures the behaviorist ethos exceptionally well.

Behaviorism's reaction against the suspect subjectivity of introspection and the non-experimental methods of Gestalt psychology was necessary at the time if Psychology was to become a scientific discipline. However, the imposition of the rigid standards of objectivism and positivism excluded from accounts of human behavior many of those experiences with which we are extremely familiar. We all experience mental images, feelings, insight, and a whole host of other unobservable and unmeasurable phenomena. To deny their importance is to deny much of what it means to be human (Searle, 1992). Cognitive psychology has been somewhat cautious in acknowledging the ability or even the need to study such phenomena, often dismissing them as "folk psychology" (Bruner, 1990). Only recently, this time as a reaction against the inadequacies of cognitive rather than behavioral theory, do we find serious consideration of subjective experiences. (These are discussed in Bruner, 1991, Clancey, 1993, Dennett, 1991, Edelman, 1992, Pinker, 1997, Searle, 1992, Varela, Thompson & Rosch, 1991, among others. They are also addressed elsewhere in this Handbook.)

Cognitive psychology's reaction against the inability of behaviorism to account for much human activity arose mainly from a concern that the link between a stimulus and a response was not straightforward, that there were mechanisms that intervened to reduce the predictability of a response to a given stimulus, and that stimulus-response accounts of complex behavior unique to humans, like the acquisition and use of language, were extremely complex and contrived. (Chomsky's [1964] review of Skinner's [1957] S-R account of language acquisition is a classic example of this point of view and is still well worth reading.) Cognitive psychology therefore shifted focus to mental processes that operate on stimuli presented to the perceptual and cognitive systems, and which usually contribute significantly to whether or not a response is made, when it is made, and what it is. Whereas behaviorists claim that such processes cannot be studied because they are not directly observable and measurable, cognitive psychologists claim that they must be studied because they alone can explain how people think and act the way they do. Somewhat ironically, cognitive neuroscience reveals that the mechanisms that intervene between stimulus and response are, after all, chains of internal stimuli and responses, of neurons activating and changing other neurons, though in very complex sequences and networks. Markowitsh (2000) discusses some of these topics, mentioning that the successful acquisition of information is accompanied by changes in neuronal morphology and long-term potentiation of inter-neuron connections.

Let me give two examples of the transition from behavioral to cognitive theory. The first concerns memory, the second mental imagery. Behavioral accounts of how we remember lists of items are usually associationist. Memory in such cases is accomplished by learning S-R associations among pairs of items in a set and is improved through practice (Gagné, 1965; Underwood, 1964). However, we now know that this is not the whole story and that mechanisms intervene between the stimulus and the response that affect how well we remember. The first of these is the collapsing of items to be remembered into a single "chunk". Chunking is imposed by the limits of short-term memory to roughly seven items (Miller, 1956). Without chunking, we would never be able to remember more than seven things at once. When we have to remember more than this limited number of items, we tend to learn them in groups that are manageable in short-term memory, and then to store each group as a single unit. At recall, we "unpack"

(Anderson, 1983) each chunk and retrieve what is inside. Chunking is more effective if the items in each chunk have something in common, or form a spatial (McNamara 1986; McNamara, Hardy & Hirtle, 1989) or temporal (Winn, 1986) group.

A second mechanism that intervenes between a stimulus and response to promote memory for items is interactive mental imagery. When people are asked to remember pairs of items and recall is cued with one item of the pair, performance is improved if they form a mental image in which the two items appear to interact (Paivio, 1971, 1983; Bower, 1970). For example, it is easier for you to remember the pair "Whale - Cigar" if you imagine a whale smoking a cigar. The use of interactive imagery to facilitate memory has been developed into a sophisticated instructional technique by Levin and his colleagues (Morrison & Levin, 1987; Peters & Levin, 1986). The considerable literature on the role of imagery in paired-associate and other kinds of learning is summarized by Paivio (1971, 1983; Clark & Paivio, 1991).

The importance of these memory mechanisms to the development of cognitive psychology is that, once understood, they make it very clear that a person's ability to remember items is improved if the items are meaningfully related to each other or to the person's existing knowledge. The key word here is "meaningful". For now, we shall simply assert that what is meaningful to a person is determined by what they can remember of what they have already learned. This implies a circular relationship among learning, meaning and memory -- that what we learn is affected by how meaningful it is, that meaning is determined by what we remember, and that memory is affected by what we learn. However, this circle is not a vicious one. The reciprocal relationship between learning and memory, between environment and knowledge, is the driving force behind established theories of cognitive development (Piaget, 1968) and of cognition generally (Neisser, 1976). It is also worth noting that Ausubel's (1963) important book on meaningful verbal learning proposed that learning is most effective when memory structures appropriate to what is about to be learned are created or activated through advance organizers. More generally, then, cognitive psychology is concerned with meaning, or semantics, while behavioral psychology is not.

The most recent research suggests that the activities that connect memory and the environment are not circular but concurrent. Clark's (1997) "continuous reciprocal causation", and Rosch's (1999) idea that concepts are bridges between the mind and the world, only existing while a person interacts with the environment, underlie radically different views of cognition. We will return to these later.

Mental imagery provides another interesting example of the differences between behavioral and cognitive psychology. Imagery was so far beyond the behaviorist pale that one key article that re-introduced the topic was subtitled, "The return of the ostracized". Images were, of course, central to Gestalt theory, as we have seen. But because they could not be observed, and because the only route to them was through introspection and self-report, they had no place in behavioral theory.

Yet we can all, to some degree, conjure up mental images. We can also deliberately manipulate them. Kosslyn, Ball & Reiser (1978) trained their subjects to "zoom" in and out of images of familiar objects and found that the "distance" between the subject and the imagined object constrained the subject's ability to describe the object. To discover the number of claws on an imaged cat, for example, the subject had to move closer to it in the mind's eye.

This ability to manipulate images is useful in some kinds of learning. The method of "Loci" (Kosslyn, 1985; Yates, 1966), for example, requires a person to create a mental image of a familiar place in the mind's eye and to place in that location images of objects that are to be remembered. Recall consists of mentally walking through the place and describing the objects you find. The effectiveness of this technique, which was known to the orators of ancient Greece, has been demonstrated empirically (Cornoldi & De Beni, 1991; De Beni & Cornoldi, 1985).

Mental imagery will be discussed in more detail later. For now, we will draw attention to two methodological issues that are raised by its study. First, some studies of imagery are symptomatic of a conservative color to some cognitive research. As Anderson (1978) has commented, any conclusions about the existence and nature of images can only be inferred from observable behavior. You can only really tell if the Loci method has worked if a person can name items in the set to be remembered. On this view, the behaviorists were right. Objectively observable behavior is all the evidence even cognitive researchers have to go on. This means that, until recently, cognitive psychology has to study mental representation and processes indirectly and to draw conclusions about them by inference rather than from direct measurement. Now, we have direct evidence from neuroscience (Farah, 2000; Kosslyn & Thompson, 2000) that the parts of the brain that become active when subjects report the presence of a mental image are the same that are active during visual perception.

The second methodological issue is exemplified by Kosslyn's (1985) use of introspection and self-report by subjects to obtain his data on mental images. The scientific tradition that established the methodology of behavioral psychology considered subjective data to be biased, tainted and therefore unreliable. This precept has carried over into the mainstream of cognitive research. Yet, in his invited address to the 1976 AERA conference, the sociologist Uri Bronfenbrenner (1976) expressed surprise, indeed dismay, that educational researchers did not ask subjects their opinions about the experimental tasks they carry out, nor about whether they performed the tasks as instructed or in some other way. Certainly, this stricture has eased in much of the educational research that has been conducted since 1976, and non-experimental methodology, ranging from ethnography to participant observation to a variety of phenomenologically-based approaches to inquiry are the norm for certain types of educational research (see, for example, the many articles that appeared in the mid-'eighties, among them Baker, 1984; Eisner, 1984; Howe, 1983; Phillips, 1983). Nonetheless, strict cognitive psychology has tended, even recently, to adhere to experimental methodology, based on positivism, which makes research such as Kosslyn's on imagery somewhat suspect to some.

Cognitive science

Inevitably, cognitive psychology has come face to face with the computer. This is not merely a result of the times in which the discipline has developed, but emerges from the intractability of many of the problems cognitive psychologists seek to solve. The necessity for cognitive researchers to build theory by inference rather than from direct measurement has always been problematic.

One way around this problem is to build theoretical models of cognitive activity, to write computer simulations that predict what behaviors are likely to occur if the model is an accurate instantiation of cognitive activity, and to compare the behavior predicted by the model -- the output

from the program -- to the behavior observed in subjects. Examples of this approach is found in the work of Marr (1982) on vision, and in connectionist models of language learning (Pinker, 1999, pp. 103-117). We look at Marr's work in more detail.

Marr began with the assumption that the mechanisms of human vision are too complex to understand at the neurological level. Instead, he set out to describe the functions that these mechanisms need to perform as what is seen by the eye moves from the retina to the visual cortex and is interpreted by the viewer. The functions Marr developed were mathematical models of such processes as edge detection, the perception of shapes at different scales, and stereopsis (Marr & Nishihara, 1978). The electrical activity observed in certain types of cell in the visual system matched the activity predicted by the model almost exactly (Marr & Ullman, 1981).

Marr's work has had implications that go far beyond his important research on vision, and as such serves as a paradigmatic case of cognitive science. Cognitive science is not called that because of its close association with the computer but because it adopts the functional or computational approach to psychology that is so much in evidence in Marr's work. By "functional" (see Pylyshyn, 1984), we mean that it is concerned with the functions the cognitive system must perform not with the devices through which cognitive processes are implemented. A commonly-used analogy is that cognitive science is concerned with cognitive software not hardware. By "computational" (Arbib & Hanson, 1987; Richards, 1988) we mean that the models of cognitive science take information that a learner encounters, perform logical or mathematical operations on it, and describe the outcomes of those operations. The computer is the tool that allows the functions to be tested, the computations to be performed. In a recent extensive exposition of a new theory of science, Wolfram (2002) goes so far as to claim that *every* action, whether natural or man-made, including all cognitive activity, is a "program" that can be recreated and run on a computer. Wolfram's theory is provocative, as yet unsubstantiated, but will doubtless be talked about in the literature for the next little while.

The tendency in cognitive science to create theory around computational rather than biological mechanisms points to another characteristic of the discipline. Cognitive scientists conceive of cognitive theory at different levels of description. The level that comes closest to the brain mechanisms that create cognitive activity is obviously biological. However, as Marr presumed, this level was at the time virtually inaccessible to cognitive researchers, consequently requiring the construction of more abstract functional models. The number, nature and names of the levels of cognitive theory vary from theory to theory and from researcher to researcher. Anderson (1990, chapter 1) provides a useful discussion of levels, including those of Chomsky (1965), Pylyshyn (1984), Rumelhart & McClelland (1986) and Newell (1982) in addition to Marr's and his own. In spite of their differences, each of these approaches to levels of cognitive theory implies that if we cannot explain cognition in terms of the mechanisms through which it is actually realized, we can explain it in terms of more abstract mechanisms that we can profitably explore. In other words, the different levels of cognitive theory are really different metaphors for the actual processes that take place in the brain.

The computer has assumed two additional roles in cognitive science beyond that of a tool for testing models. First, some have concluded that, because computer programs written to test cognitive theory accurately predict observable behavior that results from cognitive activity, cognitive activity must itself be computer-like. Cognitive scientists have proposed numerous

theories of cognition that embody the information-processing principles and even the mechanisms of computer science (Boden, 1988; Johnson-Laird, 1988). Thus we find reference in the cognitive science literature to input and output, data structures, information processing, production systems, and so on. More significantly, we find descriptions of cognition in terms of the logical processing of symbols (Larkin & Simon, 1987; Salomon, 1979; Winn, 1982). Second, cognitive science has provided both the theory and the impetus to create computer programs that "think" just as we do. Research in artificial intelligence blossomed during the 'eighties, and was particularly successful when it produced intelligent tutoring systems (Anderson & Lebiere, 1998; Anderson & Reiser, 1985; Anderson, Boyle & Yost, 1985; Wenger, 1987) and expert systems (Forsyth, 1984). The former are characterized by the ability to understand and react to the progress a student makes working through a computer-based tutorial program. The latter are smart "consultants", usually to professionals whose jobs require them to make complicated decisions from large amounts of data.

Its successes notwithstanding, AI has shown up the weaknesses of many of the assumptions that underlie cognitive science, especially the assumption that cognition consists in the logical mental manipulation of symbols. Scholars (Bickhard, 2000; Clancey, 1993; Clark, 1997; Dreyfus, 1979; Dreyfus & Dreyfus, 1986; Edelman, 1992; Freeman & Nuñez, 1999; Searle, 1992) have criticized this and other assumptions of cognitive science as well as of computational theory and, more basically, functionalism. The critics imply that cognitive scientists have lost sight of the metaphorical origins of the levels of cognitive theory and have assumed that the brain really does compute the answer to problems by symbol manipulation. Searle's comment sets the tone, "If you are tempted to functionalism, we believe you do not need refutation, you need help." (1992, p. 9).

Section summary

We have traced the development of cognitive theory up to the point where, in the 1980s, it emerged preeminent among psychological theories of learning and understanding. Although many of the ideas in this section will be developed in what follows, it is useful at this point to provide a short summary of the ideas presented so far. We have seen that cognitive psychology returned to center stage largely because stimulus-response theory did not adequately or efficiently account for many aspects of human behavior that we all observe from day to day. The research on memory and mental imagery that we briefly described indicated that psychological processes and prior knowledge intervene between the stimulus and the response making the latter less predictable. We have also seen that non-experimental and non-objective methodology is now deemed appropriate for certain types of research. However, it is possible to detect a degree of conservatism in main-stream cognitive psychology that still insists on the objectivity and quantifiability of data.

Cognitive science, emerging from the confluence of cognitive psychology and computer science, has developed its own set of assumptions, not least among which are computer models of cognition. These have served well, at different levels of abstraction, to guide cognitive research, leading to such applications as intelligent tutors and expert systems. However, the computational theory and functionalism that underlie these assumptions have been the source of recent criticism and their role in research in Education needs to be reassessed.

The implications of all of this for research and practice in Educational Technology will be dealt with in section V. I would nonetheless like to anticipate three aspects of that discussion. First, educational technology research, and particularly main-stream instructional design practice, needs

to catch up with developments in psychological theory. As I have suggested elsewhere (Winn, 1989), it is not sufficient simply to substitute cognitive objectives for behavioral objectives and to tweak our assessment techniques to gain access to knowledge schemata rather than just to observable behaviors. More fundamental changes are required including, now, those required by demonstrable limitations to cognitive theory itself.

Second, shifts in the technology itself away from rather prosaic and ponderous computer-assisted programmed instruction to highly interactive multimedia environments permit educational technologists to develop serious alternatives to didactic instruction (Winn, 2002). We can now use technology to do more than direct teaching. We can use it to help students construct meaning for themselves through experience in ways proposed by constructivist theory and practice described elsewhere in this Handbook and by Duffy & Jonassen (1992), Duffy, Jonassen & Lowyck (1993), Winn & Windschitl (2001a) and others.

Third, the proposed alternatives to computer models of cognition, that explain first-person experience, non-symbolic thinking and learning, and reflection-free cognition, lay the conceptual foundation for educational developments of virtual realities (Winn & Windschitl, 2001a). The full realization of these new concepts and technologies lies in the future. However, we need to get ahead of the game and prepare for when these eventualities become a reality.

III. MENTAL REPRESENTATION

The previous section showed the historical origins of the two major aspects of cognitive psychology that are addressed in this and the next section. These have been and continue to be mental representation and mental processes. Our example of representation was the mental image, and passing reference was made to memory structures and hierarchical chunks of information. We also talked generally about the input, processing and output functions of the cognitive system, and paid particular attention to Marr's account of the processes of vision. In this section we look at traditional and emerging views of mental representation.

The nature of mental representation and how to study it lie at the heart of traditional approaches to cognitive psychology. Yet, as we have seen, the nature, indeed the very existence, of mental representation are not without controversy. It merits consideration here, however, because it is still pervasive in educational technology research and theory, because it has, in spite of shortcomings, contributed to our understanding of learning, and because it is currently regaining some of its lost status as a result of research in several disciplines. This section therefore deals with cognitive theories of mental representation. How we store information in memory, represent it in our mind's eye, or manipulate it through the processes of reasoning has always seemed relevant to researchers in educational technology. Our field has sometimes supposed that the way in which we represent information mentally is a direct mapping of what we see and hear about us in the world (see Knowlton, 1966; Cassidy & Knowlton, 1983; Sless, 1981). Educational technologists have paid a considerable amount of attention to how visual presentations of different levels of abstraction affect our ability to reason literally and analogically (Winn, 1982). Since the earliest days of our discipline (Dale, 1946), we have been intrigued by the idea that the degree of realism with which we present information to students determines how well they learn. More recently

(Salomon, 1979), we have come to believe that our thinking uses various symbol systems as tools, enabling us both to learn and to develop skills in different symbolic modalities. How mental representation is affected by what a student encounters in the environment has become inextricably bound up with the part of our field we call "message design" (Fleming & Levie, 1993; Rieber, 1994, chapter 7).

Schema theory.

The concept of "schema" is central to early cognitive theories of representation. There are many descriptions of what schemata are. All descriptions concur that a schema has the following characteristics: 1) It is an organized structure that exists in memory and, in aggregate with all other schemata, contains the sum of our knowledge of the world (Paivio, 1974), 2) It exists at a higher level of generality, or abstraction, than our immediate experience with the world, 3) It consists of concepts that are linked together in propositions, 4) It is dynamic, amenable to change by general experience or through instruction, 5) It provides a context for interpreting new knowledge as well as a structure to hold it. Each of these features requires comment.

Schema as memory structure. The idea that memory is organized in structures goes back to the work of Bartlett (1932). In experiments designed to explore the nature of memory that required subjects to remember stories, Bartlett was struck by two things: First, recall, especially over time, was surprisingly inaccurate; second, the inaccuracies were systematic in that they betrayed the influence of certain common characteristics of stories and turns of event that might be predicted from everyday occurrences in the world. Unusual plots and story structures tended to be remembered as closer to "normal" than in fact they were. Bartlett concluded from this that human memory consisted of cognitive structures that were built over time as the result of our interaction with the world and that these structures colored our encoding and recall of subsequently-encountered ideas. Since Bartlett's work, both the nature and function of schemata have been amplified and clarified experimentally. The next few paragraphs describe how.

Schema as abstraction. A schema is a more abstract representation than a direct perceptual experience. When we look at a cat, we observe its color, the length of its fur, its size, its breed if that is discernible and any unique features it might have, such as a torn ear or unusual eye color. However, the schema that we have constructed from experience to represent "cat" in our memory, and by means of which we are able to identify any cat, does not contain these details. Instead, our "cat" schema will tell us that it has eyes, four legs, raised ears, a particular shape and habits. However, it leaves those features that vary among cats, like eye color and length of fur, unspecified. In the language of schema theory, these are "place-holders", "slots", or "variables" to be "instantiated" through recall or recognition (Norman & Rumelhart, 1975).

It is this abstraction, or generality, that makes schemata useful. If memory required that we encode every feature of every experience that we had, without stripping away variable details, recall would require us to match every experience against templates in order to identify objects and events, a suggestion that has long since been discredited for its unrealistic demands on memory capacity and cognitive processing resources (Pinker, 1985). On rare occasions, the generality of schemata may prevent us from identifying something. For example, we may misidentify a penguin because, superficially, it has few features of a bird. As we shall see below, learning requires the

modification of schemata so that they can accurately accommodate unusual instances, like penguins, while still maintaining a level of specificity that makes them useful.

Schema as dynamic structure. A schema is not immutable. As we learn new information, either from instruction or from day-to-day interaction with the environment, our memory and understanding of our world will change. Schema theory proposes that our knowledge of the world is constantly interpreting new experience and adapting to it. These processes, which Piaget (1968) has called "assimilation" and "accommodation", and which Thorndyke & Hayes-Roth (1979) have called "bottom up" and "top down" processing, interact dynamically in an attempt to achieve cognitive equilibrium without which the world would be a tangled blur of meaningless experiences. The process works like this: 1) When we encounter a new object, experience or piece of information, we attempt to match its features and structure (nodes and links) to a schema in memory (bottom-up). On the basis of the success of this first attempt at matching, we construct a hypothesis about the identity of the object, experience or information, on the basis of which we look for further evidence to confirm our identification (top-down). If further evidence confirms our hypothesis we assimilate the experience to the schema. If it does not, we revise our hypothesis, thus accommodating to the experience.

Learning takes place as schemata change when they accommodate to new information in the environment and as new information is assimilated by them. Rumelhart and Norman (1981) discuss important differences in the extent to which these changes take place. Learning takes place by accretion, by schema tuning, or by schema creation. In the case of accretion, the match between new information and schemata is so good that the new information is simply added to an existing schema with almost no accommodation of the schema at all. A hiker might learn to recognize a golden eagle simply by matching it to an already-familiar bald eagle schema noting only the absence of the former's white head and tail.

Schema tuning results in more radical changes in a schema. A child raised in the inner city might have formed a "bird" schema on the basis of seeing only sparrows and pigeons. The features of this schema might be: a size of between 3 and 10 inches; flying by flapping wings; found around and on buildings. This child's first sighting of an eagle would probably be confusing, and might lead to a mis-identification as an airplane, which is bigger than ten inches long and does not flap its wings. Learning, perhaps through instruction, that this creature was indeed a bird would lead to changes in the "bird" schema, to include soaring as a means of getting around, large size and mountain habitat. Rumelhart & Norman describe schema creation as occurring by analogy. Stretching the bird example to the limits of credibility, imagine someone from a country that has no birds but lots of bats for whom a "bird" schema does not exist. The creation of a bird schema could take place by temporarily substituting the features birds have in common with bats and then specifically teaching the differences. The danger, of course, is that a significant residue of bat features could persist in the bird schema, in spite of careful instruction. Analogies can therefore be misleading (Spiro, Feltovich, Coulson & Anderson, 1989) if they are not used with extreme care.

More recently, research in conceptual change (Posner et al., 1982; Vosniadou, 1994; Windschitl & André, 1998) has extended our understanding of schema change in important ways. Since this work concerns cognitive processes, we will deal with it in the next major section. Suffice it note, for now, that it aims to explain more of the mechanisms of change, lead to practical

applications in teaching and learning, particular in Science, and more often than not involves technology.

Schema as context. Not only does a schema serve as a repository of experiences. It provides a context that affects how we interpret new experiences and even directs our attention to particular sources of experience and information. From the time of Bartlett, schema theory has been developed largely from research in reading comprehension. And it is from this area of research that the strongest evidence comes for the decisive role of schemata in interpreting text.

The research design for these studies requires the activation of a well-developed schema to set a context, the presentation of a text, that is often deliberately ambiguous, and a comprehension posttest. For example, Bransford and Johnson (1972) had subjects study a text that was so ambiguous as to be meaningless without the presence of an accompanying picture. Anderson, Reynolds, Schallert & Goetz (1977) presented ambiguous stories to different groups of people. A story that could have been about weight lifting or a prison break was interpreted to be about weight-lifting by students in a weight-lifting class, but in other ways by other students. Musicians interpreted a story that could have been about playing cards or playing music as if it were about music.

Finally, recent research on priming (Schachter & Buckner, 1998; Squire & Knowlton, 1995) is beginning to identify mechanisms that *might eventually* account for schema activation, whether conscious or implicit. After all, both perceptual and semantic priming predispose people to perform subsequent cognitive tasks in particular ways, and produce effects that are not unlike the contextualizing effects of schemata. However, given that the experimental tasks used in this priming research are far simpler and implicate more basic cognitive mechanisms than those used in the study of how schemata are activated to provide contexts for learning, linking these two bodies of research is currently risky, if not unwarranted. Yet, the possibility that research on priming could eventually explain some aspects of schema theory is too intriguing to ignore completely.

Schema theory and Educational Technology.

Schema theory has influenced educational technology in a variety of ways. For instance, the notion of activating a schema in order to provide a relevant context for learning finds a close parallel in Gagné, Briggs & Wager's (1988) third instructional "event", "stimulating recall of prerequisite learning". Reigeluth's (Reigeluth & Stein, 1983) "Elaboration theory" of instruction consists of, among other things, prescriptions for the progressive refinement of schemata. The notion of a "generality", that has persisted through the many stages of Merrill's instructional theory (Merrill, 1983, 1988; Merrill, Li & Jones, 1991), is close to a schema.

There are however three particular ways in which educational technology research has used schema theory (or at least some of the ideas it embodies, in common with other cognitive theories of representation). The first concerns the assumption, and attempts to support it, that schemata can be more effectively built and activated if the material that students encounter is somehow isomorphic to the putative structure of the schema. This line of research extends into the realm of cognitive theory earlier attempts to propose and validate a theory of audiovisual (usually more visual than audio) education and concerns the role of pictorial and graphic illustration in instruction (Dale, 1946; Carpenter, 1953; Dwyer, 1972, 1978, 1987). The second way in which educational

technology has used schema theory has been to develop and apply techniques for students to use to impose structure on what they learn and thus make it more memorable. These techniques are referred to, collectively, by the term "information mapping".

The third line of research consists of attempts to use schemata to represent information in a computer and thereby to enable the machine to interact with information in ways analogous to human assimilation and accommodation. This brings us to a consideration of the role of schemata, or "scripts" (Schank & Abelson, 1977) or "plans" (Minsky, 1975) in AI and "intelligent" instructional systems. The next sections examine these lines of research.

Schema-message isomorphism: Imaginal encoding.

There are two ways in which pictures and graphics can affect how information is encoded in schemata. Some research suggests that a picture is encoded directly as a mental image. This means that encoding leads to a schema that retains many of the properties of the message that the student saw, such as its spatial structure and the appearance of its features. Other research suggests that the picture or graphic imposes a structure on information first and that propositions about this structure rather than the structure itself are encoded. The schema therefore does not contain a mental image but information that allows an image to be created in the mind's eye when the schema becomes active. This and the next section examine these two possibilities.

Research into imaginal encoding is typically conducted within the framework of theories that propose two (at least) separate, though connected, memory systems. Paivio's (1983, Clark & Paivio, 1992) "dual coding" theory and Kulhavy's (Kulhavy, Lee & Caterino, 1985; Kulhavy, Stock & Caterino, 1994) "conjoint retention" theory are typical. Both theories assume that people can encode information as language-like propositions or as picture-like mental images. This research has provided evidence that 1) pictures and graphics contain information that is not contained in text and 2) that information shown in pictures and graphics is easier to recall because it is encoded in both memory systems, as propositions and as images, rather than just as propositions which is the case when students read text. As an example, Schwartz and Kulhavy (1981) had subjects study a map while listening to a narrative describing the territory. Map subjects recalled more spatial information related to map features than non-map subjects, while there was no difference between recall of the two groups on information not related to map features. In another study, Abel & Kulhavy (1989) found that subjects who saw maps of a territory recalled more details than subjects who read a corresponding text suggesting that the map provided "second stratum cues" that made it easier to recall information.

Schema-message isomorphism: Structural encoding.

Evidence for the claim that graphics help students organize content by determining the structure of the schema in which it is encoded comes from studies that have examined the relationship between spatial presentations and cued or free recall. The assumption is that the spatial structure of the information on the page reflects the semantic structure of the information that gets encoded. For example, Winn (1980) used text with or without a block diagram to teach about a typical food web to high-school subjects. Estimates of subjects' semantic structures representing the content were obtained from their free associations to words naming key concepts in the food web

(e.g. "consumer", "herbivore"). It was found that the diagram significantly improved the closeness of the structure the students acquired to the structure of the content.

McNamara, Hardy and Hirtle (1989) had subjects learn spatial layouts of common objects. Ordered trees, constructed from free recall data, revealed hierarchical clusters of items that formed the basis for organizing the information in memory. A recognition test, in which targeted items were primed by items either within or outside the same cluster, produced response latencies that were faster for same-cluster items than for different-item clusters. The placement of an item in one cluster or another was determined, for the most part, by the spatial proximity of the items in the original layout. In another study, McNamara (1986) had subjects study the layout of real objects placed in an area on the floor. The area was divided by low barriers into four quadrants of equal size. Primed recall produced response latencies suggesting that the physical boundaries imposed categories on the objects when they were encoded that overrode the effect of absolute spatial proximity. For example, recall Responses were slower to items physically close but separated by a boundary than two items further apart but within the same boundary. The results of studies like these have been the basis for recommendations about when and how to use pictures and graphics in instructional materials (Levin, Anglin & Carney, 1987; Winn, 1989b).

Schemata and Information Mapping.

Strategies exploiting the structural isomorphism of graphics and knowledge schemata have also formed the basis for a variety of text- and information-mapping schemes aimed at improving comprehension (Armbruster & Anderson, 1982, 1984; Novak, 1998) and study skills (Dansereau et al., 1979; Holley & Dansereau, 1984). Research on the effectiveness of these strategies and its application is one of the best examples of how cognitive theory has come to be used by instructional designers.

The assumptions underlying all information-mapping strategies are that if information is well-organized in memory it will be better remembered and more easily associated with new information, and that students can be taught techniques exploiting the spatial organization of information on the page that make what they learn better organized in memory. We have already given examples of research that bears out the first of these assumptions. We turn now to research on the effectiveness of information-mapping techniques.

All information-mapping strategies (reviewed and summarized by Hughes, 1989) require students to learn ways to represent information, usually text, in spatially constructed diagrams. With these techniques, they construct diagrams that represent the concepts they are to learn as verbal labels often in boxes and that show interconcept relations as lines or arrows. The most obvious characteristic of these techniques is that students construct the information maps for themselves rather than studying diagrams created by someone else. In this way, the maps require students to process the information they contain in an effortful manner while allowing a certain measure of idiosyncrasy in the ideas are shown, both of which are attributes of effective learning strategies.

Some mapping techniques are radial, with the key concept in the center of the diagram and related concepts on arms reaching out from the center (Hughes, 1989). Other schemes are more hierarchical with concepts placed on branches of a tree (Johnson, Pittelman & Heimlich, 1986).

Still others maintain the roughly linear format of sentences but use special symbols to encode inter-concept relations, like equals signs or different kinds of boxes (Armbruster & Anderson, 1984). Some computer-based systems provide more flexibility by allowing "zooming" in or out on concepts to reveal subconcepts within them and by allowing users to introduce pictures and graphics from other sources (Fisher et al., 1990).

The burgeoning of the World Wide Web has given rise to a new way to look at information mapping. Like many of today's teachers, Malarney (2000) had her students construct web pages to display their knowledge of a subject, in this case "Ocean Science". Malarney's insight was that the students' web pages were in fact concept maps, in which ideas were illustrated and connected to other ideas through layout and hyperlinks. Carefully used, the Web can serve both as a way to represent "maps" of content, and also as tools to assess what students know about something, using tools described, for example, by Novak (1998).

Regardless of format, information mapping has been shown to be effective. In some cases, information mapping techniques have formed part of study skills curricula (Holley & Dansereau, 1984; Schewel, 1989). In other cases, the technique has been used to improve reading comprehension (Ruddell & Boyle, 1989) or for review at the end of a course (Fisher et al., 1990). Information mapping has been shown to be useful for helping students write about what they have read (Sinatra, Stahl-Gemake & Morgan, 1986) and works with disabled readers as well as with normal ones (Sinatra, Stahl-Gemake & Borg, 1986). Information mapping has proved to be a successful technique in all of these tasks and contexts, showing it to be remarkable robust.

Information mapping can, of course, be used by instructional designers (Jonassen, 1990, 1991; Suzuki, 1987). In this case, the technique is used not so much to improve comprehension as to help designers understand the relations among concepts in the material they are working with. Often, understanding such relations makes strategy selection more effective. For example, a radial outline based on the concept "zebra" (Hughes, 1989) shows, among other things, that a zebra is a member of the horse family and also that it lives in Africa on the open grasslands. From the layout of the radial map, it is clear that membership of the horse family is a different kind of interconcept relation than the relation with Africa and grasslands. The designer will therefore be likely to organize the instruction so that a zebra's location and habitat are taught together and not at the same time as the zebra's place in the mammalian taxonomy is taught. We will return to instructional designers' use of information mapping techniques in our discussion of cognitive objectives in section V.

All of this seems to suggest that imagery-based and information-structuring strategies based on graphics have been extremely useful in practice. Tversky (2001) provides a summary and analysis of research into graphical techniques that exploit both the analog (imagery-based) and metaphorical (information-organizing) properties of all manner of images. Her summary shows that they can be effective. Vekiri (2002) provides a broader summary of research into the effectiveness of graphics for learning that includes several studies concerned with mental representation. However, the whole idea of isomorphism between an information display outside the learner and the structure and content of a memory schema implies that information in the environment is mapped fairly directly into memory. As we have seen, this basic assumption of much of cognitive theory is currently being seriously challenged. For example, Bickhard (2000) asks, "What's wrong

with 'encodingism'?", his term for direct mapping to mental schemata. The extent to which this challenge threatens the usefulness of using pictures and graphics in instruction remains to be seen.

Schemata and AI.

Another way in which theories of representation have been used in educational technology is to suggest ways in which computer programs designed to "think" like people might represent information. Clearly, this application embodies the "computer models of mind" assumption that we looked at above (Boden, 1988).

The structural nature of schemata make them particularly attractive to cognitive scientists working in the area of artificial intelligence. The reason for this is that they can be described using the same "language" that is used by computers and therefore provide a convenient link between human and artificial thought. The best examples are to be found in the work of Minsky (1975) and of Schank and his associates (Schank & Abelson, 1977). Here, schemata provide constraints on the meaning of information that the computer and the user share that make the interaction between them more manageable and useful. The constraints arise from only allowing what typically happens in a given situation to be considered. For example, certain actions and verbal exchanges commonly take place in a restaurant. You enter. Someone shows you to your table. Someone brings you a menu. After a while, they come back and you order your meal. Your food is brought to you in a predictable sequence. You eat it in a predictable way. When you have finished, someone brings you the bill, which you pay. You leave. It is not likely (though not impossible, of course) that someone will bring you a basketball rather than the food you ordered. Usually, you will eat your food rather than sing to it. You use cash or a credit card to pay for your meal rather than offering a giraffe. In this way, the almost infinite number of things that can occur in the world are constrained to relatively few, which means that the machine has a better chance of figuring out what your words or actions mean.

Even so, schemata (or "scripts" as Schank [1984] calls them) cannot contend with every eventuality. This is because the assumptions about the world that are implicit in our schemata, and therefore often escape our awareness, have to be made explicit in scripts that are used in AI. Schank (1984) provides examples as he describes the difficulties encountered by TALE-SPIN, a program designed to write stories in the style of Aesop's fables.

"One day Joe Bear was hungry. He asked his friend Irving Bird where some honey was. Irving told him there was a beehive in the oak tree. Joe walked to the oak tree. He ate the beehive." Here, the problem is that we know beehives contain honey, and while they are indeed a source of food, they are not themselves food, but contain it. The program did not know this, nor could it infer it. A second example, with Schank's own analysis, makes a similar point:" Henry Ant was thirsty. He walked over to the river bank where his good friend Bill Bird was sitting. Henry slipped and fell in the river. He was unable to call for help. He drowned."

"This was not the story that TALE-SPIN set out to tell. [...] Had TALE-SPIN found a way for Henry to call to Bill for help, this would have caused Bill to try to save him. But the program had a rule that said that being in water prevents speech. Bill was not asked a direct question, and there was no way for any character to just happen to notice something. Henry drowned because the

program knew that that's what happens when a character that can't swim is immersed in water." (1984, p. 84).

The rules that the program followed, leading to the sad demise of Henry, are rules that normally apply. People do not usually talk when they're swimming. However, in this case, a second rule should have applied, as we who understand a calling-for-help-while-drowning schema are well aware of.

The more general issue that arises from these examples is that people have extensive knowledge of the world that goes beyond any single set of circumstances that might be defined in a script. And human intelligence rests on the judicious use of this general knowledge. Thus, on the rare occasion that we do encounter someone singing to their food in a restaurant, we have knowledge from beyond the immediate context that lets us conclude the person has had too much to drink, or is preparing to sing a role at the local opera and is therefore not really singing to her food at all, or belongs to a cult for whom praising the food about to be eaten in song is an accepted ritual. The problem for the AI designer is therefore how much of this general knowledge to allow the program to have? Too little, and the correct inferences cannot be made about what has happened when there are even small deviations from the norm. Too much, and the task of building a production system that embodies all the possible reasons for something to occur becomes impossibly complex.

It has been claimed that AI has failed (Dreyfus & Dreyfus, 1986) because "intelligent" machines do not have the breadth of knowledge that permits human reasoning. A continuing project called "Cyc" (Guha & Lenat, 1991; Lenat, Guha, Pittman, Pratt, & Shepherd, 1990) has as its goal to imbue a machine with precisely the breadth of knowledge that humans have. Over a period of years, programmers will have worked away at encoding an impressive number of facts about the world. If this project is successful, it will be testimony to the usefulness of general knowledge of the world for problem-solving and will confirm the severe limits of a "schema" or "script" approach to AI. It may also suggest that the schema metaphor is misleading. Maybe people do not organize their knowledge of the world in clearly delineated structures. A lot of thinking is "fuzzy", and the boundaries among schemata are permeable and indistinct.

Mental Models

Another way in which theories of representation have influenced research in educational technology is through psychological and human factors research on mental models. A mental model, like a schema, is a putative structure that contains knowledge of the world. For some, mental models and schemata are synonymous. However, there are two properties of mental models that make them somewhat different from schemata. Mayer (1992, p. 431) identifies these as 1) representations of objects in whatever the model describes and 2) descriptions of how changes in one object effect changes in another. Roughly speaking, a mental model is broader in conception than a schema because it specifies causal actions among objects that take place within it. However, you will find any number of people who disagree with this distinction. The term "envisionment" is often applied to the representation of both the objects and the causal relations in a mental model (DeKleer & Brown, 1981; Strittmatter & Seel, 1989). This term draws attention to the visual metaphors that often accompany discussion of mental models. When we use a mental model, we "see" a representation of it in our "mind's eye". This representation has spatial properties akin to

those we notice with our biological eye. Some objects are "closer to" some than to others. And from seeing changes in our mind's eye in one object occurring simultaneously with changes in another, we infer causality between them. This is especially true when we consciously bring about a change in one object ourselves. For example, Sternberg and Weil (1980) gave subjects problems to solve of the kind "If A is bigger than B and C is bigger than A, who is the smallest?" Subjects who changed the representation of the problem by placing the objects A, B and C in a line from tallest to shortest were most successful in solving the problem because envisioning it in this way allowed them simply to "see" the answer. Likewise, envisioning what happens in an electrical circuit that includes an electric bell (DeKleer & Brown, 1981) allows someone to come to understand how it works. In short, a mental model can be "run" like a film or computer program and watched in the mind's eye while it is running. You may have observed world-class skiers "running" their model of a slalom course, eyes closed, body leaning into each gate, before they make their run.

The greatest interest in mental models by educational technologists lies in ways of getting learners to create good ones. This implies, as in the case of schema creation, that instructional materials and events act with what learners already understand in order to construct a mental model that the student can use to develop understanding. Just how instruction affects mental models has been the subject of considerable research, summarized by Gentner & Stevens (1983), Mayer (1989a), Rouse & Morris (1986) among others. At the end of his review, Mayer lists seven criteria that instructional materials should meet for them to induce mental models that are likely to improve understanding. (Mayer refers to the materials, typically illustrations and text, as "conceptual models" that describe in graphic form the objects and causal relations among them.) A good model is: Complete -- it contains all the objects, states and actions of the system; Concise -- it contains just enough detail; Coherent -- it makes "intuitive sense"; Concrete -- it is presented at an appropriate level of familiarity; Conceptual -- it is potentially meaningful; Correct -- the objects and relations in it correspond to actual objects and events; Considerate -- it uses appropriate vocabulary and organization. If these criteria are met, then instruction can lead to the creation of models that help students understand systems and solve problems arising from the way the systems work. For example, Mayer (1989b) and Mayer & Gallini (1990) have demonstrated that materials, conforming to these criteria, in which graphics and text work together to illustrate both the objects and causal relations in systems (hydraulic drum brakes, bicycle pumps) were effective at promoting understanding. Subjects were able to answer questions requiring them to draw inferences from their mental models of the system using information they had not been explicitly taught. For instance, the answer (not explicitly taught) to the question, "Why do brakes get hot?" can only be found in an understanding of the causal relations among the pieces of a brake system. A correct answer implies that an accurate mental model has been constructed.

A second area of research on mental models in which educational technologists are now engaging arises from a belief that interactive multimedia systems are effective tools for model-building (Hueyching & Reeves, 1992; Kozma, Russell, Jones, Marx & Davis, 1993; Seel & Dörr, 1994; Windschitl & André, 1998). For the first time, we are able, with reasonable ease, to build instructional materials that are both interactive and that, through animation, can represent the changes of state and causal actions of physical systems. Kozma et al. (1993) describe a computer system that allows students to carry out simulated chemistry experiments. The graphic component of the system (which certainly meets Mayer's criteria for building a good model) presents information about changes of state and causality within a molecular system. It "corresponds to the molecular-level mental models that chemists have of such systems" (Kozma et al., 1993, p. 16).

Analysis of constructed student responses and of think-aloud protocols have demonstrated the effectiveness of this system for helping students construct good mental models of chemical reactions. Byrne, Furness & Winn (1995) described a virtual environment in which students learn about atomic and molecular structure by building atoms from their sub-atomic components. The most successful treatment for building mental models was a highly interactive one. Winn & Windschitl (2002) examined videotapes of students working in an immersive virtual environment that simulated processes on physical oceanography. They found that students who constructed and then used causal models solved problems more effectively than those who did not. Winn, Windschitl, Fruland & Lee (2002) give examples of students connecting concepts together to form causal principles as they constructed a mental model of ocean processes while working with the same simulation.

Mental Representation and the Development of Expertise.

The knowledge we represent as schemata or mental models changes as we work with it over time. It becomes much more readily accessible and useable, requiring less conscious effort to use it effectively. At the same time, its own structure becomes more robust and it is increasingly internalized and automatized. The result is that its application becomes relatively straightforward and automatic, and frequently occurs without our conscious attention. When we drive home after work, we do not have to think hard about what to do or where we are going. It is important in the research that we shall examine below that this process of "knowledge compilation and translation" (Anderson, 1983) is a slow process. One of the biggest oversights in our field has occurred when instructional designers have assumed that task analysis should describe the behavior of experts rather than novices, completely ignoring the fact that expertise develops in stages and that novices cannot simply "get there" in one jump.

Out of the behavioral tradition that continues to dominate a great deal of thinking in educational technology comes the assumption that it is possible for mastery to result from instruction. In mastery learning, the only instructional variable is the time required to learn something. Therefore, given enough time, anyone can learn anything. The evidence that this is the case is compelling (Bloom, 1984, 1987; Kulik, 1990a,b). However, "enough time" typically comes to mean the length of a unit, module or semester and "mastery" means mastery of performance not of high-level skills such as problem-solving.

There is a considerable body of opinion that expertise arises from a much longer exposure to content in a learning environment than that implied in the case of mastery learning. Labouvie-Vief (1990) has suggested that wisdom arises during adulthood from processes that represent a fourth "stage" of human development, beyond Piaget's traditional three. Achieving a high level of expertise in chess (Chase & Simon, 1973) or in the professions (Schon, 1983, 1987) takes many years of learning and applying what one has learned. This implies that learners move through stages on their way from novice-hood to expertise, and that, as in the case of cognitive development (Piaget & Inhelder, 1969), each stage is a necessary prerequisite for the next and cannot be skipped. In this case, expertise does not arise directly from instruction. It may start with some instruction, but only develops fully with maturity and experience on the job (Lave & Wenger, 1991).

An illustrative account of the stages a person goes through on the way to expertise is provided by Dreyfus & Dreyfus (1986). The stages are: Novice, advanced beginner, competence,

proficiency and expertise. Dreyfus and Dreyfus' examples are exceptionally useful in clarifying the differences between stages. The following few paragraphs are therefore based on their narrative (1986, pp. 21-35).

Novices learn objective and unambiguous facts and rules about the area that they are beginning to study. These facts and rules are typically learned out of context. For example, beginning nurses learn how to take a patient's blood pressure and are taught rules about what to do if the reading is normal, high or very high. However, they do not yet necessarily understand what blood pressure really indicates nor why the actions specified in the rules are necessary nor how they affect the patient's recovery. In a sense, the knowledge they acquire is "inert" (Cognition and Technology Group at Vanderbilt, 1990) in that, though it can be applied, it is applied blindly and without a context or rationale.

Advanced beginners continue to learn more objective facts and rules. However, with their increased practical experience, they also begin to develop a sense of the larger context in which their developing knowledge and skill operate. Within that context, they begin to associate the objective rules and facts they have learned with particular situations they encounter on the job. Their knowledge becomes "situational" or "contextualized". For example, student nurses begin to recognize patients' symptoms by means that cannot be expressed in objective, context-free rules. The way a particular patient's breathing sounds may be sufficient to indicate that a particular action is necessary. However, the sound itself cannot be described objectively, nor can recognizing it be learned anywhere except on the job.

As the student moves into competence and develops further sensitivity to information in the working environment, the number of context-free and situational facts and rules begins to overwhelm the student. The situation can only be managed when the student learns effective decision-making strategies. Student nurses at this stage often appear to be unable to make decisions. They are still keenly aware of the things they have been taught to look out for and the procedures to follow in the maternity ward. However, they are also now sensitive to situations in the ward that require them to change the rules and procedures. They begin to realize that the baby screaming its head off requires immediate attention even if to give that attention is not something set down in the rules. They are torn between doing what they have been taught to do and doing what they sense is more important at that moment. And often they dither, as Dreyfus & Dreyfus put it, "...like a mule between two bales of hay." (1986, p. 24).

Proficiency is characterized by quick, effective and often unconscious decision-making. Unlike the merely competent student, who has to think hard about what to do when the situation is at variance with objective rules and prescribed procedures, the proficient student easily grasps what is going on in any situation and acts, as it were, automatically to deal with whatever arises. The proficient nurse simply notices that a patient is psychologically ready for surgery, without consciously weighing the evidence.

With expertise comes the complete fusion of decision-making and action. So completely is the expert immersed in the task, and so complete is the expert's mastery of the task and of the situations in which it is necessary to act, that "... When things are proceeding normally, experts don't solve problems and don't make decisions; they do what normally works." (Dreyfus & Dreyfus, 1986, 30-31). Clearly, such a state of affairs can only arise after extensive experience on

the job. With such experience comes the expert's ability to act quickly and correctly from information without needing to analyze it into components. Expert radiologists can perform accurate diagnoses from x-rays by matching the pattern formed by light and dark areas on the film to patterns they have learned over the years to be symptomatic of particular conditions. They act on what they see as a whole and do not attend to each feature separately. Similarly, early research on expertise in chess (Chase & Simon, 1973) revealed that grand masters rely on the recognition of patterns of pieces on the chessboard to guide their play and engage in less in-depth analysis of situations than merely proficient players. Expert nurses sometimes sense that a patient's situation has become critical without there being any objective evidence and, although they cannot explain why, they are usually correct.

A number of things are immediately clear from his account of the development of expertise. The first is that any student must start by learning explicitly-taught facts and rules even if the ultimate goal is to become an expert who apparently functions perfectly well without using them at all. Spiro et al. (1992) claims that learning by allowing students to construct knowledge only works for "advanced knowledge" which assumes the basics have already been mastered.

Second, though, is the observation that students begin to learn situational knowledge and skills as early as the "advanced beginner" stage. This means that the abilities that appear intuitive, even magical, in experts are already present in embryonic form at a relatively early stage in a student's development. The implication is that instruction should foster the development of situational, non-objective knowledge and skill as early as possible in a student's education. This conclusion is corroborated by the study of situated learning (Brown, Collins and Duguid, 1989) and apprenticeships (Lave & Wenger, 1991) in which education is situated in real-world contexts from the start.

Third is the observation that as students becomes more expert, they are less able to rationalize and articulate the reasons for their understanding of a situation and for their solutions to problems. Instructional designers and knowledge engineers generally are acutely aware of the difficulty of deriving a systematic and objective description of knowledge and skills from an expert as they go about content or task analyses. Experts just do things that work and do not engage in specific or describable problem-solving. This also means that assessment of what students learn as they acquire expertise becomes increasingly difficult and eventually impossible by traditional means, such as tests. Tacit knowledge (Polanyi, 1962) is extremely difficult to measure.

Finally, we can observe that what educational technologists spend most of their time doing - developing explicit and measurable instruction -- is only relevant to the earliest step in the process of acquiring expertise. There are two implications of this. First, we have, until recently, ignored the potential of technology to help people learn anything except objective facts and rules. And these, in the scheme of things we have just described, though necessary, are intended to be quickly superseded by other kinds of knowledge and skills that allow us to work effectively in the world. We might conclude that instructional design, as traditionally conceived, has concentrated on creating nothing more than training wheels for learning and acting that are to be jettisoned for more important knowledge and skills as quickly as possible. The second implication is that by basing instruction on the knowledge and skills of experts, we have completely ignored the protracted development that has led up to that state. The student must go through a number of qualitatively different stages that come between novice-hood and expertise, and can no more jump directly from

stage 1 to stage 5 than a child can go from Piaget's pre-operational stage of development to formal operations without passing through the intervening developmental steps. If we try to teach the skills of the expert directly to novices, we shall surely fail.

The Dreyfus & Dreyfus account is by no means the only description of how people become experts. Nor is it to any great extent given in terms of the underlying psychological processes that enable it to develop. In the next paragraphs, we look briefly at more specific accounts of how expertise is acquired, focusing on two cognitive processes: automaticity and knowledge organization.

Automaticity. From all accounts of expertise, it is clear that experts still do the things they learned to do as novices, but more often than not they do them without thinking about them. The automatization of cognitive and motor skills is a step along the way to expertise that occurs in just about every explanation of the process. By enabling experts to function without deliberate attention to what they are doing, automaticity frees up cognitive resources that the expert can then bring to bear on problems that arise from unexpected and hitherto unexperienced events as well as allowing more attention to be paid to the more mundane though particular characteristics of the situation. This has been reported to be the case for such diverse skills as: learning psychomotor skills (Romiszowski, 1993), developing skill as a teacher (Leinhart, 1987), typing (Laroche, 1982) and the interpretation of x-rays (Lesgold et al., 1988).

Automaticity occurs as a result of overlearning (Shiffrin & Schneider, 1977). Under the mastery learning model (Bloom, 1984), a student keeps practicing and receiving feedback, iteratively, until some predetermined criterion has been achieved. At that point, the student is taught and practices the next task. In the case of overlearning, the student continues to practice after attaining mastery, even if the achieved criterion is 100 percent performance. The more students practice using knowledge and skill beyond just mastery, the more fluid and automatic their skill will become. This is because practice leads to discrete pieces of knowledge and discrete steps in a skill becoming fused into larger pieces, or "chunks". Anderson (1983, 1986) speaks of this process as "knowledge compilation" in which declarative knowledge becomes procedural. Just as a computer compiles statements in a computer language into a code that will actually run, so, Anderson claims, the knowledge that we first acquire as explicit assertions of facts or rules is "compiled" by extended practice into knowledge and skill that will run on its own without our deliberately having to attend to them. Likewise, Landa (1983) describes the process whereby knowledge is transformed first into skill and then into ability through practice. At an early stage of learning something, we constantly have to refer to statements in order to be able to think and act. Fluency only comes when we no longer have to refer explicitly to what we know. Further practice will turn skills into abilities which are characterized by being our natural, intuitive manner of doing things.

Knowledge organization. We saw briefly above that experts appear to solve problems by recognizing and interpreting the patterns in bodies of information, not by breaking down the information into its constituent parts. If automaticity corresponds to the "cognitive process" side of expertise, then knowledge organization is the equivalent of "mental representation" of knowledge by experts. There is considerable evidence that experts organize knowledge in qualitatively different ways from novices. It appears that the chunking of information that is characteristic of experts' knowledge leads them to consider patterns of information when they are required to solve

problems rather than improving the way they search through what they know to find an answer. For example, chess Masters are far less effected by time pressure than lesser players (Calderwood, Klein & Crandall, 1988). Requiring players to increase the number of moves they make in a minute will obviously reduce the amount of time they have to search through what they know about the relative success of potential moves. However, pattern recognition is a much more instantaneous process and will therefore not be as affected by increasing the number of moves per minute. Since Masters were less affected than less expert players by increasing the speed of a game of chess, it seems that they use pattern recognition rather than search as their main strategy.

Charness (1989) reported changes in a chess player's strategies over a period of nine years. There was little change in the player's skill at searching through potential moves. However, there were noticeable changes in recall of board positions, evaluation of the state of the game, and chunking of information, all of which, Charness claims, are pattern-related rather than search-related skills. Moreover, Saariluoma (1990) reported, from protocol analysis, that strong chess players in fact engaged in less extensive search than intermediate players, concluding that what is searched is more important than how deeply the search is conducted.

It is important to note that some researchers (Patel & Groen, 1991) explicitly discount pattern recognition as the primary means by which some experts solve problems. Also, in a study of expert X-ray diagnosticians, Lesgold et al. (1988) propose that experts' knowledge schemata are developed through "deeper" generalization and discrimination than novices'. Goldstone et al. (2000) cite evidence for this kind of heightened perceptual discrimination in expert radiologists, beer tasters and chick sexers. There is also evidence that the exposure to environmental stimuli that leads to heightened sensory discrimination brings about measurable changes in the auditory (Weinberger, 1993) and visual (Logothetis, Pauls & Poggio, 1995) cortex.

Internal and external representation.

Two assumptions underlie this traditional view of mental representation. First, we assume that schemata, mental models and so on change in response to experience with an environment. The mind is plastic, the environment fixed. Second, the changes make the internal representations somehow more like the environment. These assumptions are now seen to be problematic.

First, arguments from biological accounts of cognition, notably Maturana & Varela (1980, 1992), explain cognition and conceptual change in terms of adaptation to perturbations in an environment. The model is basically Darwinian. An organism adapts to environmental conditions where failure to do so will make it less likely that the organism will thrive, or even survive. At the longest time scale, this principle leads to evolution of new species. At the time scale of a single life, this principle describes cognitive (Piaget, 1968) and social (Vygotsky, 1978) development. As we shall see later, at the time scale of a single course, or even single lesson, this principle can explain the acquisition of concepts and principles. Adaptation requires reorganization of some aspects of the organism's make-up. The structures involved are entirely internal and cannot in any way consist in a direct analogical mapping of features of the environment. This is what Maturana & Varela (1992) mean when they say that the central nervous system is "informationally closed". Thus, differences in the size and form of Galapagos finches' beaks resulting from environmental adaptations may be said to *represent* different environments, because they allow us to draw inferences about environmental characteristics. But they do not *resemble* the environment in any

way. Similarly, changes in schemata or assemblies of neurons, which may *represent* experiences and knowledge of the environment, because they are the means by which we remember things to avoid or things to pursue when we next encounter them, do not in any way *resemble* the environment. Mental representation is therefore not a one-to-one mapping of environment to brain, in fact not a mapping at all.

Second, since the bandwidth of our senses is very limited, we only experience a small number of the environment's properties (Nagel, 1974; Winn & Windschitl, 2001b). The environment we know directly is therefore a very incomplete and distorted version, and it is this impoverished view that we represent internally. The German word "Umwelt", which means "environment", has come to refer to this limited, direct view of the environment (Roth, 1999). "Umwelt" was first used in this sense by the German biologist, Von Uexküll (1934), in a speculative and whimsical description of what the world might look like to creatures, such as bees and scallops. The drawings accompanying the account were reconstructions from what was known about the organisms' sensory systems. The important point is that each creature's Umwelt is quite different from another's. Both our physical and cognitive interactions with external phenomena are, by nature, with our Umwelt, not the larger environment that science explores by extending the human senses through instrumentation. This means that *the knowable environment (Umwelt) actually changes as we come to understand it*. Inuit really do see many different types of snow. And as we saw above, advanced levels of expertise, built through extensive interaction with the environment, lead to heightened sensory discrimination ability (Goldstone et al., 2000).

This conclusion has profound consequences for theories of mental representation (and for theories of cognitive processes, as we shall see in the next section). Among them is the dependence of mental representation on *concurrent* interactions with the environment. One example is the reliance of our memories on objects present in the environment when we need to recall something. Often, we place them there deliberately, such as putting a post-it note on the mirror – Clark (1997) gives this example and several others. Another example is what Gordin & Pea (1995) call "inscriptions", which are external representations we place into our environment – drawings, diagrams, doodles – in order to help us think through problems. Scaife & Rogers (1996) suggest that one advantage of making internal representations external as inscriptions is that it allows us to re-represent our ideas. Once our concepts become represented externally – become part of our Umwelt – we can interpret them like any other object we find there. They can clarify our thinking, as for example in the work reported by Tanimoto, Winn & Akers (2002), where sketches made by students learning basic computer programming skills helped them solve problems. Roth & McGinn (1998) remind us that our environment also contains other people, and inscriptions therefore let us share our ideas, making cognition a social activity. Finally, some (e.g. Rosch, 1999) argue that mental representations cannot exist independently from environmental phenomena. On this view, the mind and the world are one, an idea to which we will return in the next section. Rosch writes, "Concepts and categories do not represent the world in the mind; they are a *participating part* [italics in the original] of the mind-world whole of which the sense of mind ... is one pole, and the objects of mind ... are the other pole." (1999, p. 72).

These newer views of the nature of mental representation do not necessarily mean we must throw out the old ones. But they do require us to consider two things. First, in the continuing absence of *complete* accounts of cognitive activity based on research in neuroscience, we must consider mental images and mental models as metaphorical rather than direct explanations of

behavior. In other words, we can say that people act *as if* they represented phenomena as mental models, but not that they have models actually in their heads. This has implications for instructional practices that rely on the format of messages to induce certain cognitive actions and states. We shall return to this in the next section. Second, it requires that we give the nature of the Umwelt, and of how we are connected to it, a much higher priority when thinking about learning. Recent theories of conceptual change, of adaptation, and of embodied and embedded cognition, have responded to this requirement, as we shall see.

Summary.

In this section we have seen that theories of mental representation have influenced research in educational technology in a number of ways. Schema theory, or something very much like it, is basic to just about all cognitive research on representation. And schema theory is centrally implicated in what we call message design. Establishing predictability and control over how what appears in instructional materials and how the depicted information is represented has been high on the research agenda. So it has been of prime importance to discover a) the nature of mental schemata and b) how changing messages affects how schemata change or are created.

Mental representation is also the key to information mapping techniques that have proven to help students understand and remember what they read. Here, however, the emphasis is on how the relations among objects and events are encoded and stored in memory and less on how the objects and events are shown. Also, these interconcept relations are often metaphorical. Within the graphical conventions of information maps -- hierarchies, radial outlines and so on -- "above", "below", "close to" and "far from" use the metaphor of space to convey semantic, not spatial structure (see Winn & Solomon, 1993, for research on these "metaphorical" conventions). Nonetheless, the supposition that representing these relations in some kind of structure in memory improves comprehension and recall.

The construction of schemata as the basis for computer reasoning has not been entirely successful. This is largely because computers are literal-minded and cannot draw on general knowledge of the world outside the scripts they are programmed to follow. The results of this, for story-writing at least, are often whimsical and humorous. However, some would claim that the broader implication is that AI is impossible to attain.

Mental model theory has a lot in common with schema theory. However, studies of comprehension and transfer of changes of state and causality in physical systems suggest that well-developed mental models can be "envisioned" and "run" as students seek answers to questions. The ability of multimedia computer systems to show the dynamic interactions of components suggests that this technology has the potential for helping students develop models that represent the world in accurate and accessible ways.

The way in which mental representation changes with the development of expertise has perhaps received less attention from educational technologists than it should. This is partly because instructional prescriptions and instructional design procedures (particularly the techniques of task analysis) have not taken into account the stages a novice must go through on the way to expertise, each of which requires the development of qualitatively different forms of knowledge. This is an area to which educational technologists could profitably devote more of their attention.

Finally, we looked at more recent views of mental representation that require us to treat schemata, images, mental models and so on as metaphors, not literal accounts of representation. What is more, mental representations are of a limited and impoverished slice of the external world and vary enormously from person to person. The role of concurrent interaction with the environment was also seen to be a determining factor in the nature and function of mental representations. All of this requires us to modify, but not to reject entirely, cognitive views of mental representation.

IV. MENTAL PROCESSES.

The second major body of research in cognitive science has sought to explain the mental processes that operate on the representations we construct of our knowledge of the world. Of course, it is not possible to separate our understanding, nor our discussion, of representations and processes. Indeed, the sections on mental models and expertise made this abundantly clear. However, a body of research exists that has tended to focus more on process than representation. It is to this that we now turn.

Information Processing Accounts of Cognition

As we have seen, one of the basic tenets of cognitive theory is that information that is present in an instructional stimulus is acted upon by a variety of mediating variables before the student produces a response. Information-processing accounts of cognition describe stages that information moves through in the cognitive system and suggests processes that operate at each step. We therefore begin this section with a general account of human information processing. This account sets the stage for our consideration of cognition as symbol manipulation and as knowledge construction.

Although the rise of information-processing accounts of cognition cannot be ascribed uniquely to the development of the computer, the early cognitive psychologists' descriptions of human thinking use distinctly computer-like terms. Like computers, people were supposed to take information from the environment into "buffers", to "process" it before "storing it in memory". Information-processing models describe the nature and function of putative "units" within the human perceptual and cognitive systems, and how they interact. They trace their origins to Atkinson & Shiffrin's (1968) model of memory, which was the first to suggest that memory consisted of a sensory register, a long-term and a short-term store. According to Atkinson & Shiffrin's account, information is registered by the senses and then placed into a short-term storage area. Here, unless it is worked with in a "rehearsal buffer", it decays after about fifteen seconds. If information in the short-term store is rehearsed to any significant extent, it stands a chance of being placed into the long-term store where it remains more or less permanently. With no more than minor changes, this model of human information processing has persisted in the instructional technology literature (R. Gagné, 1974; E. Gagné, 1985) and in recent ideas about long-term and short-term, or working memory (Gagné & Glaser, 1987). The importance that every instructional designer gives to practice stems from the belief that rehearsal improves the chance of information passing into long-term memory.

A major problem that this approach to explaining human cognition pointed to was the relative inefficiency of humans at information processing. This is to be a result of the limited capacity of working memory to roughly seven (Miller, 1956) or five (Simon, 1974) pieces of information at one time. (E. Gagné [1985, p. 13] makes an interesting comparison between a computer's and a person's capacity to process information. The computer wins handily. However, humans' capacity to be creative, to imagine and to solve complex problems do not enter into the equation.) It therefore became necessary to modify the basic model to account for these observations. One modification arose from studies like those of Shiffrin & Schneider (1977) and Schneider & Shiffrin (1977). In a series of memory experiments, these researchers demonstrated that with sufficient rehearsal people automatize what they have learned so that what was originally a number of discrete items become one single "chunk" of information. With what is referred to as "overlearning", the limitations of working memory can be overcome. The notion of chunking information in order to make it possible for people to remember collections of more than five things has become quite prevalent in the information-processing literature (see Anderson, 1983). And rehearsal strategies intended to induce chunking became part of the standard repertoire of tools used by instructional designers.

Another problem with the basic information-processing account arose from research on memory for text in which it was demonstrated that people remembered the ideas of passages rather than the text itself (Bransford & Franks, 1971; Bransford & Johnson, 1972). This suggested that what was passed from working memory to long-term memory was not a direct representation of the information in short-term memory but a more abstract representation of its meaning. These abstract representations are, of course, schemata, which we discussed at some length earlier. Schema theory added a whole new dimension to ideas about information processing. So far, information-processing theory assumed that the driving force of cognition was the information that was registered by the sensory buffers -- that cognition was data-driven, or bottom up. Schema theory proposed that information was, at least in part, top down. This meant, according to Neisser (1976), that cognition is driven as much as by what we know as by the information we take in at a given moment. In other words, the contents of long-term memory play a large part in the processing of information that passes through working memory. For instructional designers, it became apparent that strategies were required that guided top-down processing by activating relevant schemata and aided retrieval by providing the correct context for recall. The Elaboration Theory of instruction (Reigeluth & Stein, 1983; Reigeluth & Curtis, 1987) achieves both of these ends. Presenting an epitome of the content at the beginning of instruction activates relevant schemata. Providing synthesizers at strategic points during instruction helps students remember, and integrate, what they have learned up to that point.

Bottom up information processing approaches have recently regained ground in cognitive theory as the result of the recognition of the importance of preattentive perceptual processes (Marr, 1982; Arbib & Hanson, 1987; Boden, 1988; Treisman, 1988; Pomerantz, Pristach & Carlson, 1989). Our overview of cognitive science, above, described computational approaches to cognition. In this return to a bottom up approach, however, we can see marked differences from the bottom-up information-processing approaches of the 'sixties and 'seventies. Bottom-up processes are now clearly confined within the barrier of what Pylyshyn (1984) called "cognitive impenetrability". These are processes over which we can have no attentive, conscious, effortful control. Nonetheless, they impose a considerable amount of organization on the information we receive from the world. In vision, for example, it is likely that all information about the organization of a scene, except for

some depth cues, is determined preattentively (Marr, 1982). What is more, preattentive perceptual structure predisposes us to make particular interpretations of information, top down (Owens, 1985a, 1985b; Duong, 1994). In other words, the way our perception processes information determines how our cognitive system will process it. Subliminal advertising works!

Related is research into implicit learning (Knowlton & Squire, 1996; Reber & Squire, 1994). Implicit learning occurs, not through the agency of preattentive processes, but in the absence of awareness that learning has occurred, at any level within the cognitive system. For example, after exposure to "sentences" consisting of letter sequences that do or do not conform to the rules of an artificial grammar, subjects are able to discriminate, significantly above chance, grammatical from non-grammatical sentences they have not seen before, even though they are not aware of the rules of the grammar, deny that they have learned anything and typically report that they are guessing (Reber, 1989). Liu (2002) has replicated this effect using artificial grammars that determine the structure of color patterns as well as letter sequences. The fact that learning can occur without people being aware of it is, in hindsight, not surprising. But while this finding has, to date, escaped the attention of mainstream cognitive psychology, its implications are wide-reaching for teaching and learning, with or without the support of technology.

Although we still talk rather glibly about short-term and long-term memory and use rather loosely other terms that come from information-processing models of cognition, information-processing theories have matured considerably since they first appeared in the late 'fifties. The balance between bottom-up and top-down theories, achieved largely within the framework of computational theories of cognition, offers researchers a good conceptual framework within which to design and conduct studies. More important, these views have developed into full-blown theories of conceptual change and adaptation to learning environments that are currently providing far more complete accounts of learning than their predecessors.

Cognition as symbol manipulation.

How is information that is processed by the cognitive system represented by it? One answer is "as symbols". This notion lies close to the heart of traditional cognitive science and, as we saw in the very first section of this chapter, it is also the source of some of the most virulent attacks on cognitive theory (Bickhard, 2000; Clancey, 1993). The idea is that we think by mentally manipulating symbols that are representations, in our mind's eye, of referents in the real world, and that there is a direct mapping between objects and actions in the external world and the symbols we use internally to represent them. Our manipulation of these symbols places them into new relationships with each other, allowing new insights into objects and phenomena. Our ability to reverse the process by means of which the world was originally encoded as symbols therefore allows us to act on the real world in new and potentially more effective ways.

We need to consider both how well people can manipulate symbols mentally and what happens as a result. The clearest evidence for people's ability to manipulate symbols in their "mind's eye" comes from Kosslyn's (1985) studies of mental imagery. Kosslyn's basic research paradigm was to have his subjects create a mental image and then to instruct them directly to change it in some way, usually by "zooming" in and out on it. Evidence for the success of his subjects at doing this was found in their ability to answer questions about properties of the imaged objects that could only be inspected as a result of such manipulation.

The work of Shepard and his colleagues (Shepard & Cooper, 1982) represents another "classical" case of our ability to manipulate images in our mind's eye. The best known of Shepard's experimental methods is as follows. Subjects are shown two three-dimensional solid figures seen from different angles. The figures may be the same or different. The subjects are asked to judge whether the figures are the same or different. In order to make the judgment, it is necessary to mentally rotate one of the figures in three dimensions in an attempt to orient it to the same position as the target so that a direct comparison may be made. Shepard consistently found that the time it took to make the judgment was almost perfectly correlated with the number of degrees through which the figure had to be rotated, suggesting that the subject was rotating it in real time in the mind's eye.

Finally, Salomon (1979) speaks more generally of "symbol systems" and of people's ability to internalize them and use them as "tools for thought". In an early experiment (Salomon, 1974), he had subjects study paintings in one of the following three conditions: a) A film showed the entire picture, zoomed in on a detail, and zoomed out again, for a total of eighty times, b) the film cut from the whole picture directly to the detail without the transitional zooming, c) the film showed just the whole picture. In a posttest of cue attendance, in which subjects were asked to write down as many details as they could from a slide of another picture, low-ability subjects performed better if they were in the "zooming" group. High-ability subjects did better if they just saw the entire picture. Salomon concluded that zooming in and out on details, which is a symbolic element in the symbol system of film, television and any form of motion picture, modeled for the low-ability subjects a strategy for cue attendance that they could execute for themselves cognitively. This was not necessary for the high ability subjects. Indeed, there was evidence that modeling the zooming strategy reduced performance of high-ability subjects because it got in the way of mental processes that were activated without prompting. Bovy (1983) found results similar to Salomon's using "irising" rather than zooming. A similar interaction between ability and modeling was reported by Winn (1986) for serial and parallel pattern recall tasks.

Salomon continued to develop the notion of internalized symbol systems serving as cognitive tools. Educational technologists have been particularly interested in his research on how the symbolic systems of computers can "become cognitive", as he put it (Salomon, 1988). The internalization of the symbolic operations of computers led to the development of a word-processor, called the "Writing Partner" (Salomon, Perkins, & Globerson, 1991), that helped students write. The results of a number of experiments showed that interacting with the computer led the users to internalize a number of its ways of processing which led to improved metacognition relevant to the writing task. More recently, (Salomon, 1993) this idea has evolved even further, to encompass the notion of distributing cognition among students and machines (and, of course, other students) to "offload" cognitive processing from one individual, to make it easier to do (Bell & Winn, 2000).

This research has had two main influences on educational technology. The first, derived from work in imagery of the kind reported by Kosslyn and Shepard, provided an attractive theoretical basis for the development of instructional systems that incorporate large amounts of visual material (Winn, 1980, 1982). The promotion and study of visual literacy (Dondis, 1973; Sless, 1981) is one manifestation of this activity. A number of studies have shown that the use of visual instructional materials can be beneficial for some students studying some kinds of content. For example, Dwyer (1972, 1978) has conducted an extensive research program on the differential

benefits of different kinds of visual materials, and has generally reported that realistic pictures are good for identification tasks, line drawings for teaching structure and function, and so on. Explanations for these different effects rest on the assumption that different ways of encoding material facilitate some cognitive processes rather than others -- that some materials are more effectively manipulated in the mind's eye for given tasks than others.

The second influence of this research on educational technology has been in the study of the interaction between technology and cognitive systems. Salomon's research which we just described is of course an example of this. The work of Papert and his colleagues at MIT's Media Lab. is another important example. Papert (1983) began by proposing that young children can learn the "powerful ideas" that underlie reasoning and problem-solving by working (perhaps "playing" is the more appropriate term) in a microworld over which they have control. The archetype of such a microworld is the well-known LOGO environment in which the student solves problems by instructing a "turtle" to perform certain tasks. Learning occurs when the children develop problem-definition and debugging skills as they write programs for the turtle to follow. Working with LOGO, children develop fluency in problem solving as well as specific skills, like problem decomposition and the ability to modularize problem solutions. Like Salomon's (1988) subjects, the children who work with LOGO (and in other technology-based environments [Harel & Papert, 1991]) internalize a lot of the computer's ways of using information and develop skills in symbol manipulation that they use to solve problems.

There is, of course, a great deal of research into problem-solving through symbol manipulation that is not concerned particularly with technology. The work of Simon and his colleagues is central to this research. (See Klahr & Kotovsky's [1989] edited volume that pays tribute to his work.) It is based largely on the notion that human reasoning operates by applying rules to encoded information that manipulate the information in such a way as to reveal solutions to problems. The information is encoded as a "production system" which operates by testing whether the conditions of rules are true or not, and following specific actions if they are. A simple example: "If the sum of an addition of a column of digits is greater than ten, then write down the right-hand integer and carry one to add to the next column". The "if ... then ..." structure is a simple production system in which a mental action is carried out (add one to the next column) if a condition is true (the number is greater than 10).

An excellent illustration is to be found in Larkin and Simon's (1987) account of the superiority of diagrams over text for solving certain classes of problems. Here, they develop a production system model of pulley systems to explain how the number of pulleys attached to a block, and the way in which they are connected, affects the amount of weight that can be raised by a given force. The model is quite complex. It is based on the idea that people need to search through the information presented to them in order to identify the conditions of a rule (e.g. If a rope passes over two pulleys between its point of attachment and a load, its mechanical advantage is doubled.) and then compute the results of applying the production rule in those given circumstances. The two steps, searching for the conditions of the production rule and computing the consequences of its application, draw upon cognitive resources (memory and processing) to different degrees. Larkin and Simon's argument is that diagrams require less effort to search for the conditions and to perform the computation, which is why they are so often more successful than text for problem-solving. Winn, Li & Schill (1991) provided an empirical validation of Larkin and Simon's account. Many other examples of symbol manipulation through production systems exist.

In the area of Mathematics education, the interested reader will wish to look at projects reported by Resnick (1976) and Greeno (1980) in which instruction makes it easier for students to encode and manipulate mathematical concepts and relations. Applications of Anderson's (1983, 1997) ACT* production system and its successors in intelligent computer-based tutors to teach geometry, algebra, and LISP are also illustrative (Anderson & Reiser, 1985; Anderson, Boyle & Yost, 1985).

For the educational technologist, the question arises of how to make symbol manipulation easier so that problems may be solved more rapidly and accurately. Larkin & Simon show that one way to do this is to show conceptual relationships by layout and links in a graphic. A related body of research concerns the relations between illustrations and text. (See summaries in Willows & Houghton, 1987; Houghton & Willows, 1987; Mandl & Levin, 1989; Schnotz & Kulhavy, 1994). Central to this research is the idea that pictures and words can work together to help students understand information more effectively and efficiently. There is now considerable evidence that people encode information in one of two memory systems, a verbal system and an imaginal system. This "Dual coding" (Paivio, 1983; Clark & Paivio, 1991), or "Conjoint retention" (Kulhavy, Lee & Caterino, 1985) has two major advantages. The first is redundancy. Information that is hard to recall from one source is still available in the other. Second is the uniqueness of each coding system. As Levin, Anglin & Carney (1987) have ably demonstrated, different types of illustration are particularly good at performing unique functions. Realistic pictures are good for identification, cutaways and line drawings for showing the structure or operation of things. Text is more appropriate for discursive and more abstract presentations.

Specific guidelines for instructional design have been drawn from this research, many presented in the summaries mentioned in the previous paragraph. Other useful sources are chapters by Mayer and by Winn in Fleming & Levine's (1993) volume on message design. The theoretical basis for these principles is by and large the facilitation of symbol manipulation in the mind's eye that comes from certain types of presentation.

However, as we saw at the beginning of this chapter, the basic assumption that we think by manipulating symbols that represent objects and events in the real world has been called into question (Clancey, 1993). There are a number of grounds for this criticism. The most compelling is that we do not carry around in our heads representations that are accurate "maps" of the world. Schemata, mental models, symbol systems, search and computation are all metaphors that give a superficial appearance of validity because they predict behavior. However, the essential processes that underlie the metaphors are more amenable to genetic and biological than to psychological analysis. We are, after all, living systems that have evolved like other living systems. And our minds are embodied in our brains, which are organs just like any other. We shall leave the implications of this line of argument to those writing other chapters in this Handbook. For now, we shall turn to a relatively uncontroversial and well-rooted corollary, that people construct knowledge for themselves rather than receiving it from someone else.

Knowledge construction through conceptual change.

One result of the mental manipulation of symbols is that new concepts can be created. Our combining and recombining of mentally-represented phenomena leads to the creation of new schemata that may or may not correspond to things in the real world. When this activity is accompanied by constant interaction with the environment in order to verify new hypotheses about

the world, we can say that we are accommodating our knowledge to new experiences in the "classic" interactions described by Neisser (1976) and Piaget (1968), mentioned earlier. When we construct new knowledge without direct reference to the outside world, then we are perhaps at our most creative, conjuring from memories thoughts and expressions of it that are entirely novel. When we looked at schema theory, we described Neisser's (1976) "perceptual cycle", which describes how what we know directs how we seek information, how we seek information determines what information we get and how the information we receive affects what we know. This description of knowledge acquisition provides a good account of how top-down processes, driven by knowledge we already have, interact with bottom-up processes, driven by information in the environment, to enable us to assimilate new knowledge and accommodate what we already know to make it compatible.

What arises from this description, which we did not make explicit earlier, is that the perceptual cycle and thus the entire knowledge acquisition process is centered on the person not the environment. Some (Duffy & Jonassen, 1992; Cunningham, 1992a; and chapter 7 in this volume) extend this notion to mean that the schemata a person constructs do not correspond in any absolute or objective way to the environment. A person's understanding is therefore built from that person's adaptations to the environment entirely in terms of the experience and understanding that the person has already constructed. There is no process whereby representations of the world are directly "mapped" onto schemata. We do not carry representational images of the world in our mind's eye. Semiotic theory, which has recently made an appearance on the Educational stage (Cunningham, 1992b; Driscoll, 1990; Driscoll & Lebow, 1992) goes one step further, claiming that we do not apprehend the world directly at all. Rather, we experience it through the signs we construct to represent it. Nonetheless, if students are given responsibility for constructing their own signs and knowledge of the world, semiotic theory can guide the development and implementation of learning activities as Winn, Hoffman & Osberg (1995) have demonstrated.

These ideas have led to two relatively recent developments in cognitive theories of learning. The first is the emergence of research on how students' conceptions change as they interact with natural or artificial environments. The second is the emergence of new ways of conceptualizing the act of interacting itself.

Students' conceptions about something change when their interaction with an environment moves through a certain sequence of events. Windschitl & André (1998), extending earlier research by Posner et al. (1982) in science education, identified a number of these. First, something occurs that cannot be explained by conceptions the student currently has. It is a surprise. It pulls the student up short. It raises to conscious awareness processes that have been running in the background. Winograd & Flores (1986) say that knowledge is now "ready to hand". Reyes & Zarama (1998) talk about "declaring a break" from the flow of cognitive activity. For example, students working with a simulation of physical oceanography (Winn et al., 2002) often do not know when they start that the salinity of seawater increases with depth. Measuring salinity shows that it does, and this is a surprise. Next, the event must be understandable. If not, it will be remembered as a fact and not really understood, because conceptions will not change. In our example, the student must understand both what the depth and salinity readouts on the simulated instruments mean. Next, the event must fit with what the student already knows. It must be believable, otherwise conceptions cannot change. The increase of salinity with depth is easy to understand once you know that seawater is denser than fresh water and that dense fluids sink below less dense ones.

Students can either figure this out for themselves, or can come to understand it through further, scaffolded (Linn, 1995), experiences. Other phenomena are less easily believed and assimilated. Many scientific laws are counter-intuitive and students' developing conceptions represent explanations based on how things seem to act rather than on full scientific accounts. Bell (1995), for example, has studied students' explanations of what happens to light when, after traveling a distance, it grows dimmer and eventually disappears. Minstrell (2001) has collected a complete set of common misconceptions, which he calls "facets of understanding", for high school physics. In many cases, students' misconceptions are robust and hard to change (Chinn & Brewer, 1993; Thorley & Stofflet, 1996). Indeed, it is at this stage of the conceptual change process that failure is most likely to occur, because what students observe simply does not make sense, even if they understand what they see. Finally, the new conception must be fruitfully applied to solving a new problem. In our example, knowing that salinity increases with depth might help the student decide where to locate the discharge pipe for treated sewage so that it will be more quickly diffused in the ocean.

It is clear that conceptual change, thus conceived, takes place most effectively in a problem-based learning environment that requires students to explore the environment by constructing hypotheses, testing them, and reasoning about what they observe. Superficially, this account of learning closely resembles theories of schema change that we looked at earlier. However, there are important differences. First, the student is clearly much more in charge of the learning activity. This is consistent with teaching and learning strategies that reflect the constructivist point of view. Second, any teaching that goes on is in reaction to what the student says or does rather than a proactive attempt to get the student to think in a certain way. Finally, the kind of learning environment in which conceptual change is easiest to attain is a highly interactive and responsive one, often that is quite complicated, and one that more often than not requires the support of technology.

The view of learning proposed in by theories of conceptual change still assumes that, though interacting, the student and the environment are separate. Earlier, we encountered Rosch's (1999) view of the one-ness of internal and external representations. The unity of the student and the environment has also influenced the way we consider mental processes. This requires us to examine more carefully what we mean when say a student interacts with the environment.

The key to this examination lies in two concepts, the "embodiment" and "embeddedness" of cognition. Embodiment (Varela et al., 1991) refers to the fact that we use our bodies to help us think. Pacing off distances and counting on our fingers are examples. More telling are using gestures to help us communicate ideas (Roth, 2002), or moving our bodies through virtual spaces so that they become data points on three-dimensional graphs (Gabert, 2001). Cognition is as much a physical activity as it is a cerebral one. Embeddedness (Clark, 1997) stresses the fact that the environment we interact with contains us as well as everything else. We are part of it. Therefore, interacting with the environment is, in a sense, interacting with ourselves as well. From research on robots and intelligent agents (Beer, 1995), and from studying children learning in classrooms (Roth, 1999), comes the suggestion that it is sometimes useful to consider the student and the environment as one single entity. Learning now becomes an emergent property of one tightly-coupled, self-organizing (Kelso, 1999), student-environment system rather than being the result of iterative interactions between a student and environment, separated in time and space. Moreover, what is the cause of what effects is impossible to determine. Clark (1997, pp. 171-2) gives a good example.

Imagine trying to catch a hamster with a pair of tongs. The animal's attempts to escape are immediate and continuous responses to our actions. At the same time, how we wield the tongs is determined by the animal's attempts at evasion. It is not possible to determine who is doing what to whom.

All of this leads to a view of learning as adaptation to an environment. Holland's (1992, 1995) explanations of how this occurs, in natural and artificial environments, are thought-provoking if not fully viable accounts. Holland has developed "genetic algorithms" for adaptation that incorporate such ideas as mutation, cross-over, even survival of the fittest. While applicable to robots as well as living organisms, they retain the biological flavor of much recent thinking about cognition that goes back to the work of Maturana & Varela (1980, 1992) that we looked at earlier. They bear considering and extending conceptual frameworks for thinking about cognition.

Summary.

Information-processing models of cognition have had a great deal of influence on research and practice of Educational Technology. Instructional designers' day-to-day frames of reference for thinking about cognition, such as working memory and long-term memory, come directly from information-processing theory. The emphasis on rehearsal in many instructional strategies arises from the small capacity of working memory. Attempts to overcome for this problem have led designers to develop all manner of strategies to induce chunking. Information-processing theories of cognition continue to serve our field well. Research into cognitive processes involved in symbol manipulation have been influential in the development of intelligent tutoring systems (Wenger, 1987) as well as in information-processing accounts of learning and instruction. The result has been that the conceptual bases for some (though not all) instructional theory and instructional design models have embodied a production-system approach to instruction and instructional design (see Landa, 1983; Scandura, 1983; Merrill, 1992). To the extent that symbol-manipulation accounts of cognition are being challenged, these approaches to instruction and instructional design are also challenged by association.

If cognition is understood to involve the construction of knowledge by students, it is therefore essential that they be given the freedom to do so. This means that, within Spiro et al.'s (1992) constraints of "advanced knowledge acquisition in ill-structured domains", instruction is less concerned with content, and sometimes only marginally so. Instead, educational technologists need to become more concerned with how students interact with the environments within which technology places them and with how objects and phenomena in those environments appear and behave. This requires educational technologists to read carefully in the area of human factors (for example, Ellis, 1993; Barfield & Furness, 1995) where a great deal of research exists on the cognitive consequences human-machine interaction. It requires less emphasis on instructional design's traditional attention to task and content analysis. It requires alternative ways of thinking about (Winn, 1993b) and doing (Cunningham, 1992a) evaluation. In short, it is only through the cognitive activity that interaction with content engenders, not the content itself, that people can learn anything at all. Extending the notion of interaction to include embodiment, embeddedness and adaptation, requires further attention to the nature of interaction itself.

Accounts of learning through the construction of knowledge by students have been generally well-accepted since the mid 'seventies and have served as the basis for a number of the

assumptions educational technologists have made about how to teach. Attempts to set instructional design firmly on cognitive foundations (DiVesta & Rieber, 1987; Bonner, 1988; Tennyson & Rasch, 1988) reflect this orientation. We examine these in the next section.

V. COGNITIVE THEORY AND EDUCATIONAL TECHNOLOGY

Educational technology has for some time been influenced by developments in cognitive psychology. Up until now, we have focused mainly on research that has fallen outside the traditional bounds of our field. We have referred to sources in philosophy, psychology, computer science, and more recently biology and cognitive neuroscience. In this section, we review the work of those who bear the label "Educational Technologist" who have been primarily responsible for bringing cognitive theory to our field. We are, again, of necessity selective, focusing on the applied side of our field, instructional design. We begin with some observations about what scholars consider design to be. We then examine the assumptions that underlay behavioral theory and practice at the time when instructional design became established as a discipline. We then argue that research in our field has helped the theory that designers use to make decisions about how to instruct keep up with developments in cognitive theory. However, design procedures have not evolved as they should have. We conclude with some implications about where design should go.

Theory, Practice and Instructional Design

At the beginning of this chapter we noted that the discipline of Educational Technology hit its stride during the heyday of behaviorism. This historical fact was entirely fortuitous. Indeed, our field could have started equally well under the influence of Gestalt or of cognitive theory. However, the consequences of this coincidence have been profound and to some extent troublesome for our field. To explain why, we need to examine the nature of the relationship between theory and practice in our field. (Our argument is equally applicable to any discipline.) The purpose of any applied field, such as educational technology, is to improve practice. The way in which theory guides that practice is through what Simon (1981) and Glaser (1976) call "design". The purpose of design, seen this way, is to select the alternative from among several courses of action that will lead to the best results. Since these results may not be optimal, but the best one can expect given the state of our knowledge at any particular time, design works through a process Simon (1981) calls "satisficing".

The degree of success of our activity as instructional designers relies on two things: first, the validity of our knowledge of effective instruction in a given subject domain and, second, the reliability of our procedures for applying that knowledge. Here is an example. We are given the task of writing a computer program that teaches the formation of regular English verbs in the past tense. To simplify matters, let us assume that we know the subject matter perfectly. As subject-matter specialists, we know a procedure for accomplishing the task -- add "ed" to the infinitive and double the final consonant if it is immediately preceded by a vowel. Would our instructional strategy therefore be to do nothing more than show a sentence on the computer screen that says, "Add 'ed' to the infinitive and double the final consonant if it is immediately preceded by a vowel"? Probably not (though such a strategy might be all that is needed for students who already understand the meanings of "infinitive", "vowel", and "consonant"). If we know something about

instruction, we will probably consider a number of other strategies as well. Maybe the students would need to see examples of correct and incorrect verb forms. Maybe they would need to practice forming the past tense of a number of verbs. Maybe they would need to know how well they were doing. Maybe they would need a mechanism that explained and corrected their errors. The act of designing our instructional computer program in fact requires us to choose from among these and other strategies the ones that are most likely to "satisfice" the requirement of constructing the past tense of regular verbs.

Knowing subject matter and something about instruction are therefore not enough. We need to know how to choose among alternative instructional strategies. Reigleuth (1983) has pointed the way. He observes that the instructional theory that guides instructional designers' choices is made up of statements about relations among the conditions, methods and outcomes of instruction. When we apply prescriptive theory, knowing instructional conditions and outcomes leads to the selection of an appropriate method. For example, an instructional prescription might consist of the statement, "To teach how to form the past tense of regular English verbs (outcome) to advanced students of English who are familiar with all relevant grammatical terms and concepts (conditions), present them with a written description of the procedure to follow (method)." All the designer needs to do is learn a large number of these prescriptions and all is well.

There are a number of difficulties with this example, however. First, instructional prescriptions rarely, if at all, consist of statements at the level of specificity as the previous one about English verbs. Any theory gains power by its generality. This means that instructional theory contains statements that have a more general applicability, such as "to teach a procedure to a student with a high level of entering knowledge, describe the procedure". Knowing only a prescription at this level of generality, the designer of the verb program needs to determine whether the outcome of instruction is indeed a procedure -- it could be a concept, or a rule, or require problem-solving -- and whether or not the students have a high level of knowledge when they start the program.

A second difficulty arises if the designer is not a subject matter specialist, which is often the case. In our example, this means that the designer has to find out that "forming the past tense of English verbs" requires adding "ed" and doubling the consonant. Finally, the prescription itself might not be valid. Any instructional prescription that is derived empirically, from an experiment or from observation and experience, is always a generalization from a limited set of cases. It could be that the present case is an exception to the general rule. The designer needs to establish whether or not this is so.

These three difficulties point to the requirement that instructional designers know how to perform analyses that lead to the level of specificity required by the instructional task. We all know what these are. Task analysis permits the instructional designer to identify exactly what the student must achieve in order to attain the instructional outcome. Learner analysis allows the designer to determine the most critical of the conditions under which instruction is to take place. And the classification of tasks, described by task analysis, as facts, concepts, rules, procedures, problem-solving and so on links the designer's particular case to more general prescriptive theory. Finally, if the particular case the designer is working on is an exception to the general prescription, the designer will have to experiment with a variety of potentially effective strategies in order to find the best one, in effect inventing a new instructional prescription along the way. Even from this simple

example, it is clear that, in order to be able to select the best instructional strategies, the instructional designer needs to know both instructional theory and how to do task and learner analysis, to classify learning outcomes into some theoretically-sound taxonomy and to reason about instruction in the absence of prescriptive principles. Our field, then, like any applied field, provides to its practitioners both theory and procedures through which to apply the theory. These procedures are predominantly, though not exclusively, analytical.

Embedded in any theory are sets of assumptions that are amenable to empirical verification. If the assumptions are shown to be false, then the theory must be modified or abandoned as a paradigm shift takes place (Kuhn, 1970). The effects of these basic assumptions are clearest in the physical sciences. For example, the assumption in modern Physics that it is impossible for the speed of objects to exceed that of light is so basic that, if it were to be disproved, the entire edifice of Physics would come tumbling down. What is equally important is that the procedures for applying theory rest on the same set of assumptions. The design of everything from cyclotrons to radio telescopes relies on the inviolability of the "light barrier".

It would seem reasonable, therefore, that both the theory and procedures of instruction should rest on the same set of assumptions and, further, that should the assumptions of instructional theory be shown to be invalid, the procedures of instructional design should be revised to accommodate the paradigm shift. In the next section, we show that this was the case when instructional design established itself within our field within the behavioral paradigm. However, we do not believe that this is the case today.

The Legacy of Behaviorism

The most fundamental principle of behavioral theory is that there is a predictable and reliable link between a stimulus and the response it produces in a student. Behavioral instructional theory therefore consists of prescriptions for what stimuli to employ if a particular response is intended. The instructional designer can be reasonably certain that with the right sets of instructional stimuli all manner of learning outcomes can be attained. Indeed, behavioral theories of instruction can be quite intricate (Gropper, 1983) and can account for the acquisition of quite complex behaviors. This means that a basic assumption of behavioral theories of instruction is that human behavior is predictable. The designer assumes that if an instructional strategy, made up of stimuli, has had a certain effect in the past, it will probably do so again.

The assumption that behavior is predictable also underlies the procedures that instructional designers originally developed to implement behavioral theories of instruction (Andrews & Goodson, 1981; Gagné, Briggs & Wager 1988; Gagné & Dick, 1983). If behavior is predictable, then all the designer needs to do is to identify the subskills the student must master that, in aggregate, permit the intended behavior to be learned, and select the stimulus and strategy for its presentation that builds each subskill. In other words, task analysis, strategy selection, try-out and revision also rest on the assumption that behavior is predictable. The procedural counterpart of behavioral instructional theory is therefore analytical and empirical, that is reductionist. If behavior is predictable, then the designer can select the most effective instructional stimuli simply by following the procedures described in an instructional design model. Instructional failure is ascribed to the lack of sufficient information which can be corrected by doing more analysis and formative testing.

Cognitive Theory and the Predictability of Behavior.

The main theme of this chapter has been cognitive theory. We have argued that cognitive theory provides a much more complete account of human learning and behavior because it considers factors that mediate between the stimulus and the response such as mental processes and the internal representations that they create. We have documented the ascendancy of cognitive theory and its replacement of behavioral theory as the dominant paradigm in educational psychology and technology. However, the change from behavioral to cognitive theories of learning and instruction has not necessarily been accompanied by a parallel change in the procedures of instructional design through which the theory is implemented.

You might well ask why a change in theory should be accompanied by a change in procedures for its application. The reason is that cognitive theory has essentially invalidated the basic assumption of behavioral theory, that behavior is predictable. Since the same assumption underlies the analytical, empirical and reductionist technology of instructional design, the validity of instructional design procedures is inevitably called into question.

Cognitive theory's challenges to the predictability of behavior are numerous and have been described in detail elsewhere (Winn, 1987, 1990, 1993b). The main points may be summarized as follows:

1. Instructional theory is incomplete. This point is trivial at first glance. However, it reminds us that there is not a prescription for every possible combination of instructional conditions, methods and outcomes. In fact, instructional designers frequently have to select strategies without guidance from instructional theory. This means that there are often times when there are no prescriptions with which to predict student behavior.

2. Mediating cognitive variables differ in their nature and effect from individual to individual. There is a good chance that everyone's response to the same stimulus will be different because everyone's experiences, in relation to which the stimulus will be processed, are different. The role of individual differences in learning and their relevance to the selection of instructional strategies has been a prominent theme in cognitive theory for more than two decades (Cronbach & Snow, 1977; Snow, 1992). Individual differences make it extremely difficult to predict learning outcomes for two reasons. First, to choose effective strategies for students, it would be necessary to know far more about the student than is easily discovered. The designer would need to know the student's aptitude for learning the given knowledge or skills, the student's prior knowledge, motivation, beliefs about the likelihood of success, learning style, level of anxiety and stage of intellectual development. Such a prospect would prove daunting even to the most committed determinist! Second, for prescriptive theory, it would be necessary to construct an instructional prescription for every possible permutation of, say, high, low and average levels on every factor that determines an individual difference. This obviously would render instructional theory too complex to be useful for the designer. In both the case of the individual student and of theory, the interactions among many factors make it impossible in practice to predict what the outcomes of instruction will be. One way around this problem has been to let students decide strategies for themselves. Learner control (Merrill, 1988; Tennyson & Park, 1987) is a feature of many effective computer-based instructional programs. However, this does not attenuate the damage to the

assumption of predictability. If learners choose their course through a program, it is not possible to predict the outcome.

3. Some students know how they learn best and will not necessarily use the strategy the designer selected for them. Metacognition is another important theme in cognitive theory. It is generally considered to consist of two complementary processes (Brown, Campione & Day, 1981). The first is students' ability to monitor their own progress as they learn. The second is to change strategies if they realize they are not doing well. If students do not use the strategies that instructional theory suggests are optimal for them, then it becomes impossible to predict what their behavior will be. Instructional designers are now proposing that we develop ways to take instructional metacognition into account as we do instructional design (Lowyck & Elen, 1994).

4. People do not think rationally as instructional designers would like them to. Many years ago, Collins (1978) observed that people reason "plausibly". By this he meant that they make decisions and take actions on the basis of incomplete information, of hunches and intuition. Hunt (1982) has gone so far as to claim that plausible reasoning is necessary for the evolution of thinking in our species. If we were creatures who made decisions only when all the information needed for a logical choice was available, we would never make any decisions at all and would not have developed the degree of intelligence that we have! Schon's (1983, 1987) study of decision-making in the professions comes to a conclusion that is similar to Collins'. More recently, research in situated learning (Brown, Collins & Duguid, 1989, Lave & Wenger, 1991; Suchman, 1987) has demonstrated that most everyday cognition is not "planful" and is most likely to depend on what is afforded by the particular situation in which it takes place. The situated nature of cognition has led Streibel (1991) to claim that standard cognitive theory can never act as the foundational theory for instructional design. Be that as it may, if people do not reason logically, and if the way they reason depends on specific and usually unknowable contexts, their behavior is certainly unpredictable.

These and other arguments (see Csiko, 1989) are successful in their challenge to the assumption that behavior is predictable. The bulk of this chapter has described the factors that come between a stimulus and a student's response that make the latter unpredictable. Scholars working in our field have for the most part shifted to a cognitive orientation when it comes to theory. However, they have not shifted to a new position on the procedures of instructional design. Since these procedures are based, like behavioral theory, on the assumption that behavior is predictable, and since the assumption is no longer valid, the procedures whereby educational technologists apply their theory to practical problems are without foundation.

Cognitive Theory and Educational Technology.

The evidence that educational technologists have accepted cognitive theory is prominent in the literature of our field (Gagné & Glaser, 1987; Richey, 1986; Spencer, 1988; Winn, 1989a). Of particular relevance to this discussion are those who have directly addressed the implications of cognitive theory for instructional design (Bonner, 1988; Champagne, Klopfer & Gunstone, 1982; DiVesta & Rieber, 1987; Schott, 1992; Tennyson & Rasch, 1988). Collectively, scholars in our field have described cognitive equivalents for all stages in instructional design procedures. Here are some examples.

Twenty-five years ago, Resnick (1976) described "cognitive task analysis" for Mathematics. Unlike behavioral task analysis which produces task hierarchies or sequences (Gagné, Briggs & Wager, 1988), cognitive analysis produces either descriptions of knowledge schemata that students are expected to construct, or descriptions of the steps information must go through as the student processes it, or both. Greeno's (1976, 1980) analysis of mathematical tasks illustrates the knowledge-representation approach and corresponds in large part to instructional designers' use of information mapping that we discussed in section III. Resnick's (1976) analysis of the way children perform subtraction exemplifies the information-processing approach. Cognitive task analysis gives rise to cognitive objectives, counterparts to behavioral objectives. In Greeno's (1976) case, these appear as diagrammatic representations of schemata, not written statements of what students are expected to be able to do, to what criterion and under what conditions (Mager, 1962).

The cognitive approach to learner analysis aims to provide descriptions of students' mental models (Bonner, 1988), not descriptions of their levels of performance prior to instruction. Indeed, the whole idea of "student model" that is so important in intelligent computer-based tutoring (Van Lehn, 1988), very often revolves around ways of capturing the ways students represent information in memory and how that information changes, not on their ability to perform tasks.

With an emphasis on knowledge schemata and the premise that learning takes place as schemata change, cognitively-oriented instructional strategies are selected on the basis of their likely ability to modify schemata rather than to shape behavior. If schemata change, DiVesta and Rieber (1987) claim, students can come truly to understand what they are learning, not simply modify their behavior.

These examples show that educational technologists concerned with the application of theory to instruction have carefully thought through the implications of the shift to cognitive theory for instructional design. Yet in almost all instances, no-one has questioned the procedures that we follow. We do cognitive task analysis, describe students' schemata and mental models, write cognitive objectives and prescribe cognitive instructional strategies. But the fact that we do task and learner analysis, write objectives and prescribe strategies has not changed. The performance of these procedures still assumes that behavior is predictable, a cognitive approach to instructional theory notwithstanding. Clearly something is amiss.

Can Instructional Design Remain an Independent Activity?

We are at the point where our acceptance of the assumptions of cognitive theory forces us to rethink the procedures we use to apply it through instructional design. The key to what it is necessary to do lies in a second assumption that follows from the assumption of the predictability of behavior. That assumption is that the design of instruction is an activity that can proceed independently of the implementation of instruction. If behavior is predictable and if instructional theory contains valid prescriptions, then it should be possible to perform analysis, select strategies, try them out and revise them until a predetermined standard is reached, and then deliver the instructional package to those who will use it with the safe expectation that it will work as intended. If, as we have demonstrated, that assumption is not tenable, we must also question the independence of design from the implementation of instruction (Winn, 1990). There are a number of indications that educational technologists are thinking along these lines. All conform loosely with the idea that decision-making about learning strategies must occur during instruction rather

than ahead of time. In their details, these points of view range from the philosophical argument that thought and action cannot be separated and therefore the conceptualization and doing of instruction must occur simultaneously (Nunan, 1983; Schon, 1987) to more practical considerations of how to construct learning environments that are adaptive, in real time, to student actions (Merrill, 1992). Another way of looking at this is to argue that, if learning is indeed situated in a context (for arguments on this issue, see McLellan, 1996), then instructional design must be situated in that context too.

A key concept in this approach is the difference between learning environments and instructional programs. Other chapters in this volume address the matter of media research. Suffice it to say here that the most significant development in our field that occurred between Clark's (1983) argument that media do not make a difference to what and how students learn and Kozma's (1991) revision of this argument was the development of software that could create rich multimedia environments. Kozma (1994) makes the point that interactive and adaptive environments can be used by students to help them think, an idea that has a lot in common with Salomon's (1979) notion of media as "tools for thought". The kind of instructional program that drew much of Clark's (1985) disapproval was didactic -- designed to do what teachers do when they teach towards a predefined goal. What interactive multimedia systems do is allow students a great deal of freedom to learn in their own way rather than in the way the designer prescribes. Zuccheromaglio (1993) refers to them as "empty technologies" that, like shells, can be filled with anything the student or teacher wishes. By contrast, "full technologies" comprise programs whose content and strategy are predetermined, as is the case with computer-based instruction.

The implementation of cognitive principles in the procedures of educational technology requires a re-integration of the design and execution of instruction. This is best achieved when we develop stimulating learning environments whose function is not entirely prescribed but which can adapt in real time to student needs and proclivities. This does not necessarily require that the environments be "intelligent" (although at one time that seemed to be an attractive proposition [Winn, 1987]). It requires, rather, that the system be responsive to the student's intelligence in such a way that the best ways for the student to learn are determined, as it were, "on the fly".

There are three ways in which educational technologists have approached this issue. The first is by developing highly interactive simulations of complex processes that require the student to use scaffolded strategies to solve problems. One of the best examples of this is the "World watcher" project (Edelson, 2001; Edelson et al., 2002), in which students use real scientific data about the weather to learn science. This project has the added advantage of connecting students with practicing scientists in an extended learning community. Other examples include Barab et al.'s (2000) use of such environments, in this case constructed by the students themselves, to learn astronomy and Hay et al.'s (2000) use of atmospheric simulations to teach science.

A second way educational technologists have sought to re-integrate design and learning is methodological. Brown (1992) describes "design experiments", in which designers build tools that they test in real classrooms, gather data that contributes both to the construction of theory and to the improvement of the tools. This process proceeds iteratively, over a period of time, until the tool is proven to be effective and our knowledge of why it is effective has been acquired and assimilated to theory. The design experiment is now the predominant research paradigm for educational technologists in many research programs, contributing equally to theory and practice.

Finally, the linear instructional design process has evolved into a non-linear one, based on the notion of systemic, rather than just systematic decision-making (Tennyson, 1997). The objectives of instruction are just as open to change as the strategies offered to students to help them learn – revision might lead to a change in objectives as easily as it does to a change in strategy. In a sense, instructional design is now seen to be as sensitive to the environment in which it takes place as learning is, within the new view of embodiment and embeddedness described earlier.

Section Summary

In this section we have reviewed a number of important issues concerning the importance of cognitive theory to what educational technologists actually do, namely design instruction. This has led us to consider the relations between theory and the procedures employed to apply it in practical ways. We observed that when behaviorism was the dominant paradigm in our field both the theory and the procedures for its application adhered to the same basic assumption, namely that human behavior is predictable. We then noted that our field was effective in subscribing to the tenets of cognitive theory, but that the procedures for applying that theory remained unchanged and continued to subscribe to the by now discredited assumption that behavior is predictable. We concluded by suggesting that cognitive theory requires of our design procedures that we create learning environments in which learning strategies are not entirely predetermined, which requires that the environments be highly adaptive to student actions. Recent technologies that permit the development of virtual environments offer the best possibility for realizing this kind of learning environment. Design experiments and the systems dynamics view of instructional design offer ways of implementing the same ideas.

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