


## Assessing the use of self-regulatory oral communication strategies by Polish learners of Spanish: The feasibility of adapting the OCSI

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**Abstract:** Language learning strategies (LLS) have evolved from a research construct approached mostly from a functional perspective to one which is investigated in specific contexts of particular skills, subsystems, and types of learners. Moreover, LLS use has been linked to self-regulated learning. From this angle, language learners may be approached as individuals resorting to various ways of enhancing their performance across macro- and micro-skills. Among them, oral communication strategies (OCS) are essential because they directly affect the effectiveness of interaction and, consequently, determine how much the learners themselves may benefit from it in terms of progress. Among inventories developed to assess the use of OCS, the Oral Communication Strategy Inventory (OCSI, Nakatani, 2006) is particularly appealing. First, it was developed on a basis of two consecutive studies, one of which was based on insights from a large sample of learners. Second, its scales were distinguished by means of robust factor analysis. For these reasons, it has been used in studies into foreign language learners' use of OCS (e.g., Pawlak, 2015, 2018). This notwithstanding, apart from the investigation by Yaman and Kavasoglu (2013), no studies relying on the OCSI (Nakatani, 2006) discuss its adaptability to local conditions in terms of its fulfilment of goodness criteria for psychometric tests. Attempting to bridge this gap in research, the present paper considers the feasibility of adapting the OCSI to assess OCS use by Polish learners of Spanish in extended curriculum settings. Overall, the results of the study show that after some minor adjustments, the inventory may be used as a reliable and valid instrument.

**Keywords:** language learning strategies, self-regulated language learning, oral communication strategies, strategy assessment, strategy inventory.

### Introduction

Speaking is frequently regarded as the most challenging of all language skills developed in the process of foreign language learning (FLL), as it involves forging an instrument and giving the student practice in its use, requires a simultaneous selection of messages and their appropriate encoding for transmission, and demands an active participation of an interlocutor (Rivers 2018). Due to the effort that learning to speak a foreign language requires, selecting appropriate strategies in the process plays a pivotal role and, once successful, contributes to boosting learners' autonomy as well as improving their self-regulation (SR) (Sukyng 2021). It is essential that language learners are able to rely on a wide repertoire of language learning strategies (LLS), which not only enable them to accom-

plish specific language tasks, but also suit their individual needs and preferences (Oxford 2017). In parallel, it is necessary to develop and adapt reliable instruments in order to measure the use of LLS in diverse learning contexts, such as oral communication in exam settings (cf. Pawlak/Oxford 2018). Surprisingly, relatively few instruments have been implemented in order to explore the use of oral communication strategies (OCS). One of them, the Oral Communication Strategies Inventory, designed by Nakatani (2006), is the focus of the present paper, which aims to investigate whether its Polish adaptation concurrently fulfils the goodness criteria for psychometric tests. Both the initial and the final version of the adaptation are available here: <https://osf.io/czv78/>.

## 1. Theoretical background

### 1.1 Language learning strategies, self-regulation, and oral communication strategies as research constructs

While LLS researchers have not unanimously agreed on a common definition of LLS, many view them as specific actions, steps, or techniques undertaken by the language learner in the language learning process (Khan 2010; Oxford 2017). Various classifications of LLS have been developed, distinguishing between direct and indirect LLS (Rubin 1981; Oxford 1990), or grouping LLS on functional grounds, that is, into *memory*, *cognitive*, *metacognitive*, *compensation*, *affective* and *social* strategies (O'Malley/Chamot 1990; Oxford 1990). These categories are present in the most popular research instrument for strategy measurement – the Strategy Inventory for Language Learning (SILL; Oxford 1990). Over time, it has become clear that while large-scale studies of LLS based on language learners' responses to the SILL (Oxford 1990) can still provide valuable contributions, for instance by linking strategy use to other learner-specific characteristics (cf. Amerstorfer 2018; Piechurska-Kuciel 2018; Przybył/Pawlak 2023), the future of LLS research lies in investigations relying on subsystem-, skill- and context-oriented approaches to strategy investigations as well as linking the construct to the notion of self-regulation in language learning (SRL; Pawlak/Oxford 2018).

Regarding the LLS-SR correspondence, despite some controversies after introducing the notion of SRL (Tseng et al. 2006), a number of researchers firmly believe that these constructs investigate the same scope of learners' experience, yet from two different angles, and thus, are intrinsic parts of one another (Gao 2007; Rose/Harmon 2013). LLS may be seen as one of the pillars of self-regulation in the language learning process (Andrade/Evans 2013), and, moreover, both strategies and SR encompass language learners' cognition, affect, and behaviour, and stem from the same, humanistic, tradition in psychology and education (Przybył/Urbańska 2020). The psychological framework was gradually incorporated by Oxford (2011, 2017), whose strategic self-regulation (S<sup>2</sup>R) model highlights the significance of selecting appropriate LLS in developing language proficiency. An important contribution in accounting for SRL was made by Gu (2019), who distinguished between (1) declarative knowledge of existing LLS, (2) procedural knowledge in terms of actual use of specific LLS strategies in a given context (e.g., task-specific strategies, communication strategies), and (3) conditioning (monitoring, regulating, evaluating) the execution of particular LLS for the language learner's individual preferences. This perspective, and, particularly, examining language learners' procedural knowledge, allows us to account for self-regulatory strategies involved in developing

speaking skills. The authors of the present paper are fully aware of the distinctions between language learning and communication strategies (Tarone 1981, 1983; Bialystok/Frohlich 1980) and the controversies in defining their scope and features (Dörnyei/Scott 1997). However, we firmly believe that the aims of being a good language learner and a good communicator largely overlap (cf. Little 1996), whereas language learning goals, while considerably different across individual learners, often tend to revolve around learning to communicate in the target language (Gu 2019).

Oral communication strategies (OCS), which “specifically focus on strategic behaviours that learners use when facing communication problems during interactional tasks” (Nakatani 2005: 79), have been distinguished as a subcategory in some of the taxonomies of LLS (e.g., Oxford 1990; Rubin 1981), yet, at the same time, some researchers may perceive them as separate constructs (Tarone 1981; Cohen 1998). Two major paradigms have been put forward in accounting for OCS. The one developed within the interactional approach focuses on interaction between interlocutors and, thus, focuses on discourse strategies that seek to negotiate the meaning, such as comprehension and confirmation checks or clarification requests during a conversation (Long 1983). The other one offers a more psycholinguistic perspective by attempting to delve into internal cognitive processes (the planning phase) during a speech production of the language learner, which are also manifested by their observable communicative behaviours or, to put it differently, the execution of the planning phase (Khan 2010). Combining these two approaches enables researchers to consider the language learner holistically instead of isolating them from their mental processes as well as account for the individuality and complexity of cognitive processes in interlocutors during a conversation.

## 1.2 Assessing the use of speaking-oriented LLS and OCS

Relatively few reliable and valid instruments that measure learners’ use of strategies for handling speaking in a foreign language are available (Yaman/Kavasoğlu 2013). Among recent studies in this field (e.g., Lantu/Tindika 2021; Limento/Bram 2022; Muslimin et al. 2022; Triyoga et al. 2022), qualitative explorations of identifying learners’ strategies for speaking tend to dominate, which remains in stark contrast to Oxford’s (1996: 25) statement that proclaims questionnaires “among the most efficient and comprehensive ways to assess the frequency of language learning strategy use”, reflecting the tendency in earlier years of strategy research. Among questionnaires, the SILL (Oxford 1990) is still regarded as a useful tool for measuring LLS use, yet, as Nakatani (2006) points out, it mostly involves general statements and strategies for the initial phase of language learning rather than strategies for the actual use of the language in specific tasks involving the use of a particular language skill, such as speaking. Moreover, some learners may not be aware of the nature of the language learning process, and thus, they may not be able to report which strategies they use for their language learning or ignore at least some of the skills in the process (Nakatani 2006).

Capitalising on early attempts to develop instruments for the measurement of speaking-oriented strategies in FLL (Cohen et al. 1996; Huang/Van Naerssen 1987; Politzer/McGroarty 1985), and aiming to achieve high reliability and validity standards, Nakatani (2006) developed the Oral Communication Strategy Inventory (OCSI). The questionnaire was implemented on the basis of findings from two exploratory studies. Conducted

in a group of 80 Japanese EFL university students aged between 18 and 21, the pilot study was followed by the main study, carried out in a group of 400 Japanese EFL university students. The inventory consists of two parts, measuring OCS for listening (26 items) and speaking (32 items). In its initial validation it was characterised by good internal reliability coefficient values (Cronbach's  $\alpha$  of 0.85 and 0.86 respectively). Eight factors were distinguished on the basis of exploratory factor with respect to strategies enhancing speaking in a foreign language: 1) Socio-affective (SA) OCS, with loadings between 0.41 and 0.82; 2) Fluency (F) OCS, such as rhythm, intonation, pronunciation and clarity of speech, with factor loadings from 0.41 to 0.77, 3) Negotiation of Meaning (NM) OCS, aimed to maintain the conversation, with factor loadings from 0.49 to 0.76, 4) Accuracy (ACC) OCS, aimed to improve clarity of speech, grammatical correctness and mistake avoidance, with factor loadings from 0.41 to 0.74, 5) Message Reduction and Alteration (MRA) OCS, with factor loadings from 0.52 to 0.80, 6) Nonverbal (N) OCS, with factor loadings from 0.66 to 0.73, 7) Message Abandonment (MA) OCS, with factor loadings from 0.43 to 0.75, and 8) Attempts to think in the Foreign Language (TFL), with factor loadings of 0.72 and -0.71. Importantly, learners' scores computed on the basis of their responses to the OCSI (Nakatani 2006) significantly correlated with their results tapped on by means of the SILL (Oxford 1990), which was interpreted as evidence for a considerable overlap in their scopes of measurement.

With time, the OCSI (Nakatani 2006) gained considerable popularity and several studies relied on it as the tool for OCS assessment (Yaman/Kavasoğlu 2013; Pawlak 2015; Rachmawaty et al. 2021). While these studies yielded interesting results, they did not explicitly examine the adaptability of the OCSI (Nakatani 2006) on the basis of goodness criteria for psychometric tests. Conversely, Yaman and Kavasoğlu (2013) meticulously developed its Turkish adaptation. Their study was based on findings from 808 pre-service teachers of English. Adapting the inventory involved back translation and consultations with experts regarding the construct validity of the instrument. According to the outcomes of statistical analyses, the values of reliability coefficients amounted to .081 for NM OCS, .074 for SA OCS, 0.79 for F OCS, 0.62 for ACC OCS, 0.55 for message reduction OCS, and 0.58 for message abandonment and TFL OCS. These results indicate that while the OCSI shows considerable potential as an instrument for researching OCS, some of its scales, particularly those for which the coefficient values do not exceed .6, may require adjustments. Some suggestions in this respect are offered in Sect. 2.3 and 3.

## 2. Method

### 2.1 Research question

The main aim of the study discussed in the present paper consisted in developing an adaptation of the OCSI (Nakatani 2006) and assessing its potential for investigating self-regulatory OCS in Spanish used by Polish secondary school students attending a school with an extended curriculum in Spanish. In this process, we followed the guidelines for adapting psychometric tests (Hornowska 2007; Mackey/Gass 2012; Dörnyei/Dewaele 2023) and attempted to tailor the OCSI (Nakatani 2006) to the specific context: Polish secondary school students participating in an extended Spanish programme. The following research question (RQ) was formulated in order to guide the present study:

*To what degree may the OCSI (Nakatani 2006) be adapted for investigating self-regulatory OCS use by Polish adolescent learners of extended-curriculum Spanish?*

## 2.2 Participants

Participants in the study were 85 secondary school students with extended curriculum in Spanish, aged 15 – 19 ( $M = 16.54$ ;  $SD = 0.99$ ), most of whom were female (71.8%). Depending on the class they attended, they received 8 – 11 hours a week of instruction in Spanish, including Spanish as a Foreign Language, Spanish Literature, Geography and History of Spain. The students in the school are required to have a command of Spanish corresponding to the CEFR level A1 (Council of Europe, 2001) on admission. The target levels of instruction are A2 for class 1, B1 for class 2, B2 for class 3, and C1 for class 4. According to this framework, 29 (34%) of the participants studied in A2 groups, 17 (20%) participated in B1 classes, 27 (32%) were B2 students, and 12 (14%) attended C1 classes. In order to account for their level of attainment in Spanish in a more detailed way, we asked participants to self-assess their general command of the language and their proficiency in speaking Spanish, each time on a scale 1–6. These self-reports amounted to 4.45 and 3.85 on average respectively, indicating that speaking was, indeed, regarded as a relatively challenging skill to develop.

## 2.3 Research instrument

A Polish adaptation of the OCSI (Nakatani 2006) was developed by the authors of the present paper in order to measure the use of OCS. The items for the Polish adaptation of the OCSI were translated from English into Polish and evaluated, modified and corrected through back translation method by the authors of this paper. On the basis of the factor analysis discussed in Sect. 1.2, the OCS were divided into seven scales: 1) social affective (SA) OCS (sample items: *I try to enjoy the conversation, I try to give a good impression to the listener*); 2) fluency-oriented (F) OCS (sample items: *I pay attention to my pronunciation, I try to speak clearly and loudly to make myself heard*); 3) negotiation for meaning (NM) OCS (sample items: *I make comprehension checks to ensure the listener understands what I want to say, I repeat what I want to say until the listener understands*); 4) accuracy-oriented (ACC) OCS (sample items: *I correct myself when I notice that I have made a mistake, I pay attention to grammar and word order during conversation*); 5) compensation (CPS) OCS (sample items: *I replace the original message with another message because of feeling incapable of executing my original intent, I reduce the message and use simple expressions*); 6) message abandonment (MA) OCS (sample items: *I leave a message unfinished because of some language difficulty, I give up when I can't make myself understood*) and 7) attempts to think in Spanish (TFL) OCS (sample items: *I try to understand what I have heard without translating it word-for-word into my own language and I think of what I want to say in my native language and then construct the English sentence*, the only item requiring reversed values in analysis).

The following items were adapted from the SILL 5.1 and 7.0 (Oxford 1989, 1990) and added to the adaptation of the inventory. The items and their sources that were added to the ACC scale are: *I ask other people to correct my pronunciation* (item 24; SILL 5.1), *I ask other people to verify that I have understood or said something correctly* (item 25; SILL 5.1). Most of the additional items were included in the CPS scale, namely: *I direct*

*the conversation to a topic for which I know the words* (item 29; SILL 5.1), *If I can't think of an English word, I use a word or phrase that means the same thing* (item 30; SILL 7.0), *To understand unfamiliar English words, I make guesses.* (item 31; SILL 7.0), *I make up new words if I do not know the right ones in English.* (item 32; SILL 7.0) *I try to guess what the other person will say next* (item 33; SILL 7.0). The items that were added to the TFL scale are: *I try to think in the Spanish language* (item 43; SILL 5.1), *I try to understand what I have heard or read without translating it word-for-word into my own language* (item 44; SILL 5.1), *In a conversation I anticipate what the other person is going to say based on what has been said so far* (item 45; SILL 5.1). Moreover, several items were supplied in order to improve the questionable reliability of the NM and MA scales (See Sect. 1.2) on the basis of recommendations. These additional items included: *If I use a term that I am not sure about, I explain what I mean* (item 18; NM scale), *I catch myself not saying everything I would like to* (item 34; MA scale) and *I keep silent when I don't know what to say* (item 39; MA scale), as well as *I relate what I hear in a conversation to situations familiar to me from texts and films in Spanish* (item 46; TFL scale).

## 2.4 Analytical procedures

In an attempt to answer the RQ, we analysed the OCSI with regard to the goodness criteria for psychometric tests (Hornowska 2007; Mackey/Gass 2012; Dörnyei/Dewaele 2022). Specifically, we addressed the following criteria:

- objectivity of the testing process and potential threats of result bias, by means of a blind diagnosis;
- standardisation of the instrument by checking the understanding of instructions and availability of norms,
- reliability of the inventory, by calculating Cronbach's alpha ( $\alpha$ ) coefficients of internal consistency for each of the scales in the original instrument as well as for scales with each and every item individually removed, and with additional items added (see Sect. 2.3 for details);
- validity of the inventory, on the basis of calculating bivariate item-total score correlations, and examining the significance of the two-tailed t-test as well as confronting the correlation values with critical values for the Pearson correlation ( $p < 0.05$ ;  $df = 2$ ).

## 3. Results

The present section discusses the results of applying the procedures described in Sect. 2.4 in order to answer the RQ. As for the *objectivity* criterion, both the original OSCI (Nakatani 2006) and its adapted version we compiled solely consist of selected-response items using a 1–5 scale, which simplifies the scoring procedure. In order to test the objectivity of our adaptation, both authors independently calculated mean values for each scale of OCS for five randomly selected participants (*blind diagnosis*) and compared the results, which were identical.

Several steps were taken to ensure a proper level of standardisation, or, in other words, homogenous conditions of testing (cf. Hornowska 2007). In order to avoid any misunderstandings, the inventory was made available in participants' native language, that is,

Polish (see Sect. 2.3 for the procedure). The online form we provided our participants with was first tested in a small group of secondary school students so as to eliminate any discrepancies in understanding the items of the inventory. No time limit was established for the testers or the participants in our study. While the actual scores of our participants regarding their use of OCS are beyond the scope of the present paper, computing them is based on the original procedure discussed by Nakatani (2006) and involves calculating mean scores for specific categories of OCS, that is SA, F, NM, ACC CPS, MA, and TFL.

With respect to the reliability of our adaptation, we calculated Cronbach's alpha ( $\alpha$ ) coefficients and compared them with Cronbach's alpha coefficients for scales with items removed one by one as well as items added (see Sect. 2.3 for details). Out of the seven scales under investigation, two, that is, NM and MA, were characterised by satisfactory  $\alpha$  values exceeding the level of 0.7. Three other scales, SA, F, and CPS, benefited in terms of internal validity from removing one or more items, while the reliability of the ACC scale was improved after including two extra items in it, namely items 24 and 25, on the basis of recommendations of a panel of experts (see Sect. 2.3). The quality of the TFL scale remained problematic regardless of any steps undertaken to improve its internal consistency. The values of specific coefficients are presented in Table 1.

Scale	Original scale $\alpha$	$\alpha$ with items deleted	$\alpha$ with items added
SA	0.55	.73 (item 6 removed)	n/a
F	0.60	.62 (item 11 removed)	n/a
NM	0.71	n/a	n/a
ACC	0.66	n/a	n/a
CPS	0.45	n/a	.61 (items 30, 31, 33)
MA	0.75	n/a	n/a
TFL	0.34	n/a	.52 (items 43-46)

Table 1. Reliability coefficients for the original and modified OCS scales.

With respect to validity, the item-total bivariate correlations all exceeded the critical value for Pearson's correlation coefficient, amounting to .18 for  $N-2 = 83$   $df$  ( $p < .05$ ). Due to space limitations, we only provide the lowest values of the correlation coefficient, which are as follows:  $r_{\min SA(item\ 3)} = 0.64$ ;  $r_{\min F(item\ 2)} = 0.49$ ,  $r_{\min NM(item\ 6)} = 0.54$ ;  $r_{\min ACC(item\ 5)} = 0.57$ ;  $r_{\min CPS(item\ 2)} = 0.42$ .  $r$ . Since the TFL scale did not achieve a satisfactory reliability, we excluded it from validity calculations.

With regard to normative interpretation, we firmly believe that solid ground exist for accepting the way of accounting for the meaning of raw scores suggested by Nakatani (2006). Accordingly, the mean values calculated for each scale of OCS which are lower than 2.5 should be considered as denoting low use of OCS, whereas those between 2.5 and 3.5 should be regarded as indicating middle use of OCS, and values exceeding 3.5 ought to be interpreted as marking high reliance on OCS. Since both the original OCSI (Nakatani, 2006) and the adaptation we developed involve calculating mean scores, the proposed interpretation remains feasible for the modified scales as well as scales including various numbers of items.

## Discussion

In answer to the RQ, we conclude that the OCSI (Nakatani 2006) may, to a substantial degree, be adapted to assess the use of self-regulatory communication strategies in groups of Polish learners of Spanish. First, as discussed in the previous section, it fulfils the goodness criteria of objectivity and standardisation. Second, while no OCSI manual exists, accounting for raw scores relies on simple and clear interpretation guidelines, based on the SILL Profile of Results (Oxford 1990: 300). Although insights from the SILL in its original form (Oxford 1990) are based on self-reported frequencies of strategy use, and the OCSI (Nakatani 2006) relies on self-reported identification with specific OCS, not only do the two inventories use the same scale (1–5), but also they largely overlap in what they measure, as shown by the results of the correlational analysis (Nakatani 2006). Moreover, each individual item of the final version of our adaptation exceeded the critical value of correlation with the scale, and thus met the *validity* criterion.

With respect to the reliability of our adaptation, we believe that six out of the seven OCS scales may be used in OCS studies of Polish learners of Spanish as well as other languages in Poland, either directly or after minor adjustments. Concerning the latter, on the basis of the computations of Cronbach's alpha discussed in the previous section, we recommend removing the final item, number 6, *I try to use fillers when I cannot think of what to say* from the SA scale, and the penultimate item, number 11, *I take my time to express what I want to say*, from the F scale. In parallel, we recommend supplementing the other scales, NM, F, and MA, with additional items, which did increase the internal consistency of the scales in our adaptation. Specifically, the following items have contributed to improving Cronbach's alpha values in our adaptation:

- 15, *I make sure I speak loud and clear enough*, earlier implemented in Strategy Inventory of Oral Communication (SIOC), and 16, *If I use a word whose meaning I am not sure of, I explain what I mean* (consulted with a panel of experts) in the NM scale,
- 25, *When I can't remember a word, I use another one with a similar meaning*, 26, *I try to guess the meaning of unknown words*, and 27, *I try to anticipate what my interlocutor is going to say, for instance, by relying on context*, all of them earlier implemented in the SILL ver. 7.0, in the CPS scale,
- 30, *I give up when I can't express what I want to*, earlier implemented in SIOC (Oxford, 1989), 28, *I catch myself not saying everything I would like to*, and 33, *I remain silent when I don't know what to say* (both consulted recommended by a panel of experts) in the MA scale.

At the same time, the final scale of strategies, that is Attempts to think in Spanish (originally involving only two items) (cf. Nakatani 2006) failed to meet the standards of satisfactory reliability even after supplementing it with several items (see Sect. 1.2). We therefore think that this scale requires further adjustments and cannot be used in OCS studies in its present shape. Overall, our findings largely corroborate the findings of the study by Yaman and Kavasoglu (2013), in which similar values of the Cronbach's alpha coefficients were reported.



### Conclusions, limitations of the study, and directions for future research

The study discussed in the present paper aimed to consider the feasibility of adapting the OCSI (Nakatani 2006) in order to assess the use of OCS by Polish learners of Spanish in extended curriculum settings. To a large extent, its results indicate that the inventory can be a reliable and valid instrument in OCS measurement. This pertains to the majority of the scales present in the original inventory as well as in our adaptation, that is, *socio-affective OCS*, *fluency-oriented OCS*, *OCS for negotiation of meaning*, *OCS focused on accuracy*, *compensation*, and *message abandonment OCS*. At the same time, we failed to develop a scale for the final category of strategies distinguished by Nakatani (2006), that is, strategies consisting in attempting to think in the language learnt. In spite of our efforts to expand the scale, originally consisting of merely two items, and supplying it with items from other strategy inventories as well as those suggested by a panel of experts, the scale did not meet the goodness criteria for psychometric tests, and hence, unlike the remaining scales, we cannot recommend it in future studies of OCS.

The major limitation of the study lies in its reliance on findings from a relatively small sample of students ( $N = 85$ ). Due to that, we were unable to employ confirmatory factor analysis as the analytical technique, and we had to rely on procedures involved in analysing scales, that is, mostly calculating coefficients of reliability and validity.

In light of the above, further, large-scale research is needed to corroborate the findings of the present study as well as to develop a valid and reliable scale for the measurement of TFL OCS. This claim also rests on the results and interpretations of previous OCS studies, according to which, OCS strategy use benefits foreign language learners as they may both contribute to greater effectiveness of interaction and assist foreign language acquisition (Pawlak 2015, 2018).

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