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How Is Reliability Useful? Collaboration in Social Studies Textbook Research

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ABSTRACT

Experience and subjectivity influence how texts are read, with reading involving "filling in the blanks". This impacts the usefulness of intercoder reliability exercises in collaborative textbook analysis. Specifically, scholars' individual backgrounds limit possibilities for substantive and meaningful intercoder reliability, particularly in international, cross-cultural, and multicultural settings. In this case, reliability is a problematic goal in textbook content analysis, possibly precluding substantive recognition of reader subjectivity—of researchers as well as students and teachers. In contrast, we argue that collaboration in textbook research can reveal the multifaceted nature of texts and generate multi-perspectival interpretations which are more meaningful in diverse contexts.

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Given how important textbooks continue to be in education (whether in hardcopy or softcopy—see Robinson et al., 2014; Friesen, 2013), how textbooks are read for learning and research remains poorly understood. Apple wrote in 1992 that research on how students use textbooks was "overly psychologized…. more concerned with questions of learning and achievement than…with whose knowledge it is …and what sociocultural roots and effects are of such processes" (p. 10). Today, textbook scholarship remains a diverse field where few broad principles are recognized, particularly in relation to how texts are read by diverse students and scholars.

Among methods used to analyze textbooks, content analysis is often preferred as it enables a systematic, objective assessment of the frequency and features of content using explicitly defined and replicable coding rules (Riffe, Lacy, & Fico, 2005). Reliability is an important concept and principal criterion in content analysis to indicate the extent to which results are consistent over time or among different analysts (Krippendorff, 2013). The most common way to establish reliability is to have multiple coders analyze the same data and calculate intercoder reliability (Lombard et al., 2002). Thus, content analysis requires a rigorous procedure with clearly defined variables to achieve replicability (Krippendorff, 2013). Meanwhile, many studies have been criticized for inadequacies related to replicability (Chu, 2017).

But how is reliability in textbook research useful? Experience influences how texts are read. This causes significant limitations to the value of reliability in collaborative textbook research. The first part of this essay discusses essential features of textbook reading and textbook research methodology. Next, we relate our textbook research and attempts to achieve intercoder reliability in a cross-cultural context. Finally, we draw out the implications for textbook research methodology.

Reading and researching textbooks

Undergirding research on textbooks is knowledge of textbook reading. In their groundbreaking work, Beck and McKeown (1988, 32) noted:

A key in engineering information for young learners is consideration of the knowledge they can be expected to bring to the text. …texts are inherently incomplete, and it takes a text and a reader to construct a complete message. Yet what young, inexperienced readers can bring to text differs greatly from what adult readers can bring. For example, adults who read a passage about the American Revolution with prior understanding of the ideas, even though they may have forgotten some of the factual details, are able to draw relationships, attach proper emphasis to the most significant ideas, and build the explanation that is the implicit goal. But a text that may seem to an adult to contain reasonable content… may seem incomprehensible to a 10-year-old.

Textbooks are reductive of knowledge, and their authors make subjective choices about structure and what to include (Kuhn, 1962). As Gautschi (2018, 130) writes "the treasury of

knowledge … is continuously expanding, and finding an answer to the question of precisely which knowledge young people should absorb … is becoming increasingly challenging"

Thus textbooks, like other texts, can be read by students and scholars in multiple ways. As Apple notes (1992, 10), this means it is not possible to "determine the meanings and politics of a text 'by a straightforward encounter with the text itself'" and "raises serious questions about whether one can fully understand the text by mechanically applying any interpretive procedure." Apple echoes Hall's understanding of reception (1973) as he details how texts can be read in dominated, negotiated, and oppositional ways. Messages can be taken "at face value," or disputed by the reader. Thus, readers make their own meaning through responding to what they read. Subjectivity becomes important as students read, "based on their own class, race, gender, and religious experiences" (Apple, 1992, 10). Textbook reading is thus a complex interpretative process in which meaning is "decoded and made anew" (Kolbeck & Röhl, 2018, 400).

Recognition of the dynamic nature of reading has led to the "practice turn" in textbook studies (Kolbeck & Röhl, 2018, 399). Such research does not treat textbooks as "static entities," but as "multifaceted," "polysemantic artefacts," used by different people in complex contexts (Hansen, 2018, 377). Attention is paid to interpretation as meaning is "situatively and culturally made" (Hansen, 2018, 403). One prevalent approach is hermeneutical analysis, a group of methods such as discourse analysis, critical discourse analysis, and narrative analysis, which positions analysts "as members of a particularly historically and culturally conditioned, ever-changing 'life-world'," with practices "laden with theory and temporality" (Morgan, 2010, 11). This approach allows analysts to interrogate data based on their preconceptions. Analysts can become reflexive in this process by scrutinizing, reflecting upon, and interrogating their positionalities and context (Berger, 2015; Guillemin & Gillam, 2004).

However, hermeneutical analyses are "at risk of being ideologized," given their reductive nature (Johnsen, 1993, 131). Here the process of understanding becomes its own result, in accordance with the researcher's subjective position (Morgan, 2010; Johnsen, 1993). Furthermore, textbooks for social studies invoke histories and memories of individuals and groups, while they reflect agendas of authors and authorities (Lässig, 2009; Morgan, 2010). Thus, a textbook discussion of one group's "war of liberation" can be regarded as a "revolt" against legitimate power by others (Pingel, 2010, 32). Such issues can lead to irreconcilable disagreements among hermeneutical textbook analysts.

Often supported by international organizations such as UNESCO and the European Union, collaborative textbook research projects have been recommended in such cases, particularly between former enemies of a conflict or between colonizers and colonized. They aim to reach agreement on controversial issues (Pingel, 2010) and identify and revise one-side self-images and images of the "other" to produce more balanced presentations to build trust between groups.

Pingel (2010) suggests that each "side" should examine their textbooks and those of at least one partner, as researchers' views, interpretations, and categories are influenced by their backgrounds. Results are compared and examined; recommendations for revision are outputs of these projects.

Yet such practices also have noteworthy limitations. Recommendations often focus on providing factual statements and a positive account of relations (Pingel, 2010). In this consensus model, different or conflicting depictions are replaced by views held in common. Thus, a compromise is cultivated. Although this lays a foundation for solving problems, controversies and disagreements are eschewed and readers are not encouraged to reflect on different views or confront protracted conflicts through this method.

In this context, content analysis of textbooks undergirded by principles and methods for achieving reliability (i.e., intercoder reliability) has emerged as a gold standard for high-quality, rigorous textbook research. Such research assumes a reliable (and more politically neutral) way to examine content and read textbooks through collaboration. Here, we question how reliability is useful in this context. We argue that intercoder textbook analysis is actually a messy, fluid, process in which positionalities of researchers still come into play. As we show, background knowledge significantly challenges ideals of reliability in cross-cultural settings. While researchers can learn from each other, reliability may not be feasible – or useful in this case.

Our project

In our research, we analyzed ethnic minority representation in *Morals of Rule of Law* textbooks published by People's Education Press and used by primary school students across China since 2017. Because of its relevance to our arguments, we begin by introducing ourselves. I ("Anna") was born, raised, and trained primarily in the United States. Anna has many years of research experience with textbooks, and ten years' experience living and conducting textbook research in Hong Kong. I ("Beth") am from Mainland China and identify as Han Chinese, the ethnic majority group there. Beth has been conducting research on textbooks in China for over five years, in addition to time as a doctoral researcher in the United Kingdom (also studying textbooks from China). I ("Chris") am from a Tibetan community in Northwestern China, with research experience (mostly as a doctoral researcher in the United Kingdom) on ethnicity and education in China.

Following the development of detailed coding instruction (designed by Beth, based on Anna's past work on Hong Kong textbooks), an initial analysis of a set of textbooks was conducted in parallel by the three of us. We then compared our coding results with the aim of establishing basic interpretative reliability. Discrepancies in results were discussed to understand differences in interpretation, with a plan to reach more reliable analyses after repeated individual coding sessions and discussions. We hoped to repeat this process until disparities were negligible, so any scholar could code in a similar way and find similar things,

which would be intended for learning, and learned by students. However, while Anna had no difficulty before in developing reliability with this technique, our process proved more challenging.

Our analyses often entailed different, even contradictory, interpretations. During our discussions, each author reflected upon their rationales for coding, which frequently related to their knowledge and experiences. This made us aware of the implications of our different positionalities and the importance of reflexivity. When disagreements persisted, we debated the way forward: if there was a best analysis or method for determining it, or whether we should accept the majority view. We detail this experience below.

Intercoder reliability: challenges

A first challenge we encountered is that some content about ethnic minorities in textbooks is implicit, such that people lacking background knowledge will not identify such information as related to minorities. An example is frequent discussions of the natural landscapes. Beth and Chris (both from China) strongly identified such content as representative of ethnic minority groups, whereas Anna did not recognize these connotations, since they, and the context they reflect, deviate from counterparts in the United States or Hong Kong (that is, landscapes or geographic features are less commonly associated outside of China with ethnic minority or Indigenous groups). Examples are given below:

Table 1. *Landscapes of ethnic minority regions*

	Location	Content	Note
1	Grade 3, Vol. 2, p. 42	My hometown is home to the beautiful Li River.	A photo shows the Li river with a few fishing boats on it.
2	Grade 5, Vol. 1, p. 49	The Tianshan Mountain Pasture: The Tianshan Mountain is a mountain system made up of several mountain ranges. Ancient people used the poem "East, West, North and South are all the mountains of Tianshan" to describe the vast expanse of the mountains.	A photo shows a piece of pastureland with mountains as the background.
3	Grade 6, Vol. 2, p. 81	In Tibetan, "Zhangniangshe" means "the place where the eagle cannot fly over". The post is 4,655 meters above sea level, with cliffs on all sides, and is known as the "post in the clouds".	This is included in the textbooks as extra reading material. The essay introduces the experience of soldiers in Zhanniangshe Post. A photo of the post on a cliff is included.

The examples in Table 1 show how landscapes are introduced in textbooks. The Li River (Example 1) is in Guangxi Ethnic Zhuang Autonomous Region, while Tianshan Mountain (Example 2) is in Xinjiang Ethnic Uyghur Autonomous Region.

For Beth and Chris, knowledge about the landscapes constituted an important part of the representation or "image" of minorities. As Beth and Chris understood, editors of textbooks wish to instill a sense that minority regions (often at China's frontier) are part of Chinese territory. The Post in Example 3 is in the disputed China-India border area (known as Donglang in China and Doka La in India), where the two countries have been in military confrontation since 2017. But such information is implicit, known to Beth and Chris due to their research expertise. While Anna was not aware about it, it is also likely that students (and even teachers) might not understand the content as intended.

Implicitness was seen in other cases. For example, one textbook states, "The country's grasslands are vast, and the nomads who live on them mainly graze cattle and sheep" (Grade 4, Vol. 2, 55). Near this text is a photograph of two men herding sheep. We also disagreed on how to code this. The "traditional" imagination of the Han in textbooks, known by Beth, is that Han people live by farming or in cities, whereas minority groups, such as Tibetans and Mongols, live a nomadic lifestyle. But some Han people also live a nomadic lifestyle, and many minorities farm or live in cities. Thus, how to code this content depended on our interpretations.[1]

Previous research on textbook representation of Chinese minorities also shows that the attempt to capture maximum content leads to lower coefficients for some variables, as ambiguity is created in coding (Chu, 2018).[2] In our analysis, to improve reliability we could exclude such ambiguous information. This is a standard practice to produce higher intercoder reliability (Krippendorff, 2013). Nevertheless, we believed the landscape of minority regions in textbooks was symbolic and worth inclusion.

A second challenge related to connotations: whether minorities were portrayed positively, negatively, neutrally, or in a complex or mixed way. Attitude measures are often used in content analysis to develop a systematic assessment of bias (Krippendorff, 2013). In our research, this

[1] The implicitness of representations also applies to human subjects. One lesson discusses historical figure An Lushan, a general who rebelled against the Tang Dynasty (618-907 AD). His rebellion became a turning point in the Tang Dynasty from strength to decline (Grade 3, Vol. 2, p. 85). While the lesson did not specify his ethnic identity, his ethnic identity is controversial. He was from a Sute group (Suguda) originally from Central Asia (now Uzbekistan), and this part of Central Asia was incorporated into Tang Dynasty. He would have been regarded as a minority in Tang Dynasty (though the concept of "minority" in China is a modern construction). But editors avoid his ethnicity because this may lead to controversies related to the sovereignty of China and Uzbekistan.

[2] The lowest Krippendorff Alpha in Chu's (2018) research was 0.66, lower than the acceptable level (0.8). Content analysts also prefer single-valued to multi-valued data, since it is difficult to use statistic tools to evaluate multi-valued texts (Krippendorff, 2013).

is a core issue related to representation of diversity. However, it was difficult to reach an agreement on these issues. Consider the text below:

> The villages of ethnic Hani in China are usually built halfway up a mountain, with the slopes above them covered in water-conserving forests, and the slopes below them densely covered with terraced fields (Grade 6, Vol. 2, 29).

A photo shows the village with mountains and terraced fields in the background. The text and photo are in a lesson on how people can interact with the environment. Beth coded them as "positive," as he believed the village is used as an example of harmonious human-nature coexistence. Chris and Anna coded them "neutral," as they believed they simply depict reality. The link of minorities to natural scenes is also regarded as "negative" by other researchers, who observe binary depictions of ethnic minorities as "traditional" and "primitive" and Han as "modern" and "urban" (Chu, 2015, 2018; Gladney, 1994; Harrell, 1995). Thus, researchers focusing on different meanings develop different interpretations.

We faced a related experience coding a text and image of an ethnic Dong expert of traditional embroidery (Grade 3, Vol. 2, 47). Again, Beth interpreted it as "positive," as he believed the editors were trying to show skills and attractive handcrafts of the group. However, Anna and Chris sensed a complicated implicit meaning, as they read the association of the Dong with embroidery as implying, they were old-fashioned, reinforcing a bias against minorities as "backwards" (Yi, 2008; Gladney, 1994).

Our interpretations also related to our understanding of politics in China. One lesson includes a cartoon girl wearing a Tibetan-style dress, saying (as translated): "In my hometown in Tibet, many schools adopt Chinese and Tibetan bilingual teaching" (Grade 6, Vol. 1, 40). Anna and Chris coded this as neutral, presenting a fact without apparent judgment. However, Beth coded this as mixed, due to the status of bilingual education in China. While the official rhetoric is that bilingual education guarantees minorities' rights to use their language in schools, scholars argue the policy is ultimately assimilative (He, 2014; Yan & Whitty, 2017). Thus, people with different knowledge interpret this content in divergent ways. While most Han teachers and students might not be aware of the politics of bilingual education, ethnic minority teachers and students (in this example, Tibetans) could develop more complex responses.

A third challenge related to our different interpretations of the state. People and scholars from different countries identify the state differently due to diverse modes of governance, states' varying roles in public life, and myriad models of minority-state relations. During our coding, we also learned that coming from different ethnic backgrounds can make a difference. An example is given below:

> During the Long March, the Red Army strictly implemented the Party's ethnic policy, respected the customs and habits of the ethnic minorities and

> received the support and assistance of the ethnic minority people. In May 1935, the Central Red Army entered the ethnic Yi-inhabited areas in western Sichuan. The Chief of Staff of the Red Army, Liu Bocheng, made a blood oath with the chief of the Yi tribe, Xiaoyedan, at Yihai in accordance with the customs of the ethnic Yi group and formed a brotherhood. The Yihai Alliance, which achieved ethnic unity and helped the Red Army pass through this area smoothly, became a great story in the Red Army's Long March (Grade 5, Vol. 2, 65).

In our coding, we wished to analyze discussions of inter-ethnic relations and state-minority relations. By "inter-ethnic relations," we mean interactions between people from different groups, while "state-minority relations" refers to how the state manages and influences minority groups and vice versa. But when we read and coded the text above, we disagreed due to our different views of the state.

For Anna, this text contained no discussion of the state, as the Red Army and its representatives did not clearly represent the state in the text, or in her understanding of Chinese history at that time.[1] As it did not clearly indicate the coming together of groups, she did not identify this as relevant to the analysis. For Chris, this was an example of inter-ethnic relations, because she understood the text to reflect interactions between the Han, implicitly represented by the Red Army and Party leaders, and the Yi. However, Beth saw this as an instance of state-minority relations, as the Red Army was the prototype of the People's Liberation Army, while the Army as well as the Chinese Communist Party transcend ethnicity (while both are dominated by Han people, other groups may join; Bulag, 2009). Moreover, the interchanging use of "party" (*dang*) and "state" (*guojia*) throughout textbooks required reflection on how they overlap in China.

Most discussions of ethnic minorities focused on relationships (inter-ethnic or state-minority). In fact, Chinese minorities are primarily constructed in the texts through relational discourse. But because of the ambiguous conceptualization of groups and relationships, we initially considered abandoning these topics as their inclusion resulted in low reliability. As a result, we would end up only with variables focusing on easily-observed and countable features of minorities, such as their dress, architecture, festivals, gender, etc. In other words, most discussions of minorities would need to be excluded to achieve reliability.

Yet such an examination would be incomplete, focused on (and indicating the centrality of) trivial "facts" and not the rich messages generated from discussions of relationships and other implicit meanings and connotations. Likewise, Krippendorff (2013, 242) acknowledged that "typical content analyses include clerical variables, publication, date, length, and mechanically

[1] The Chinese Communist Party was not the ruling party of China during the Long March (1934-1936). It was seen as illegal and was cracked down on by the then ruling party, the Nationalist Party/Kuomintang.

obtained measures that tend to be perfectly reliable, whereas the variables that matter are most typically more difficult to code and end up being less reliable." Similarly, others using content analysis in researching ethnic minorities in China had limited variables focused on easily observed, countable features (Chu, 2018), which misses the significance of the politics of representation in China.

Finally, since our coding was influenced by our experiences, as we compared and discussed coding to develop validity and establish a baseline for reliability, we influenced each other's understandings. Our attempts to establish some sense of validity were, in another way, efforts to explain to each other how our individual interpretations were reasonable. Thus, our practices were educational, but problematic in relation to intercoder reliability, as our backgrounds became dynamic parts of our research. Indeed, long debates transpired since the exercise reported on here, related to reliability and validity and their meaning and constituent features in education research, in which we found our individual views correlated with personal idiosyncrasies and with differences in our backgrounds, experiences, and training.

In relation, Krippendorff (2013) regards the reconciliation of disagreements in content analysis as problematic and affording no reliability. Ideally, coders should work independently. While it is not unusual to see reconciliation in content analysis, as researchers go back and forth to revise variables and instructions during coding, a common practice is to consult experts to establish validity and hire a second coder to follow the instruction for coding made by the researcher (for example, Chu, 2018).

However, consulting experts does not guarantee validity, as different experts have different views on the issues at the core of the research (Yan, 2020). Our consultation with experts in minority education and schoolteachers in China showed their interpretations are also diverse due to their backgrounds, idiosyncrasies, or research experience. Additionally, in our case, Beth's training to Chris and Anna (as second and third coders) became problematic since both are experts in the research. To avoid ambiguities, Beth had to define variables clearly and precisely. But this became a way of narrowing how texts or illustrations should be interpreted. Chris and Anna were able to challenge such definitions as experts; otherwise, they had to adopt Beth's definitions, while they still partly disagreed based on their professional knowledge. As a result, training became a matter of influence.

We have detailed our process to demonstrate how reliability is (and is not) achieved in textbook research. To put it simply, making clear and detailed instruction for coding and training coders is a process of eliminating interpretations. This process might be helpful to achieve reliability, but it limits understanding of the nature of textbook representation. Actually, it has rarely been easy for us to achieve consensus since, often, we insist on our own judgment. We believe each interpretation is valuable and worthy of presenting in our findings, as they reveal the multifaceted nature of textbook representation.

Implications

The ideals of reliability and validity in textbook research contrast with our experiences, which reveal that textbooks are open to widely diverse interpretations by students and others with different knowledge and assumptions. These limitations should be recognized in conducting textbook research. Considering means to ameliorate these challenges through discussion further illustrates how textbook reading consists of "filling in the blanks" in textbooks which are inherently reductive. What is true for the researcher is also true for the teacher and the student: We ignore their potential readings as we ignore some of our own for research reliability.

While the dynamic nature of reception has been examined previously, textbook researchers should be mindful about the need for reflexivity, and educational texts should be read by diverse scholars in collaboration to approach any kind of useful sense of reliability across groups: that is, a sense of reliability that is relevant to how texts might likely be read by diverse students and educators. Traditionally, collaborative content analysis has been seen as a better method for textbook research because it allows researchers to work toward reliability, whereas hermeneutic analysis is believed more suitable for scholars working alone, with readings that cannot easily be standardized (Krippendorff, 2013, 88). But our experience shows that a reliable analysis limits diverse interpretations and obstructs the development of meaningful insights from reading, particularly in cross-cultural settings. In contrast, giving up on reliability allows us to explore the complexity of the texts and avoid the trivialization of our findings.

The idea that textbook research quality is determined by reproducibility and the associated effort to focus on objective, singular "facts" as findings implies a positivist view of research. However, reading is always hermeneutic, and interpretations normally vary among readers. The key point here is that, while we are not inclined to a relativist position, textbooks are open to interpretation by readers *within normal educational processes*. As a result, research findings of textbook analyses are always open to divergent views, and divergent views are rarely a matter of objectively correct or incorrect interpretations. This makes socially relevant textbook studies distinctive from scientific educational research.

Our experience leads us to think beyond a consensus model that aims toward intercoder reliability or other forms of scholarly compromise as textbook researchers. Instead, identifying and recognizing controversies and differing, dynamic interpretations should be valued in textbook research as these are inherent features of textbook reading. In this case, a revised, nontraditional sense of reliability might be considered, that focuses on whether texts offer clear openings to meaningfully recognize and engage multiple perspectives. Such an approach can support recommendations to produce textbooks that productively address controversial issues and provide students with alternative views. Such research can better evaluate textbooks' usefulness toward their aims, as the social studies aspire in part to expose students to the world

of ideas, while reliable textbook studies are less capable of exploring controversial issues usefully, in ways that can fruitfully reflect upon and enhance textbook content in education.

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