

# The Adaptation and Cultural Translation of the Pedagogical Theory of Formal Stages in U.S. Discourse around 1900

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## Abstract

This paper uses a selected case study to show how the theoretical topos of formal stage theory of Herbartian provenance, which originated in the German-speaking world, underwent an adaptation and semantic shift in U.S. discourse around 1900. The findings presented here relate to the interpretation of the human cognitive process and the subsequent understanding of the formal stages by the U.S. educators Charles and Frank McMurry, which was shaped by the scientific-theoretical location within the natural science paradigm. In doing so, the McMurry brothers emphasized the parallel between the steps of the scientific approach and the formal steps of instruction, thus making instruction a (natural) science-based instruction. On the one hand, this interpretation can be explained by the possibility of communicative connectivity in discourse and thus the generation of communicative resonance. On the other hand, it was apparently a functional strategy to justify the scientific nature of pedagogy and thus provided a convincing argument for its position, while at the same time drawing on an internal logic of U.S. educational thought.

First, the thematic framework is set, and the relevant persons are introduced. Subsequently, the theoretical location or perspective on which the present article is based will be explicated. Then, based on a text-hermeneutic<sup>i</sup> analysis, the respective understandings of the formal stage theory are elaborated to subsequently carry out a comparison of the understandings in a comparative-constructive procedure. Based on this, the justification contexts for the adaptations and adaptations are extrapolated against the background of the theoretical perspective.

## Key Words

Cultural transfer; Herbartianism; formal stage theory; transculturation; transformation; globalization; U.S. educational thinking

This article uses the findings of a case study on the transformation of an aspect of a pedagogical theory in the context of its transfer from the German-speaking world to the United States around 1900 to show how certain aspects of this theory were adapted, translated, or transposed. The reference here is to the (pedagogical)<sup>ii</sup> Herbartianism, which developed and spread during the second half of the 19th century through individuals such as Tuiskon Ziller, Karl Volkmar Stoy, and Wilhelm Rein. This scientific school was concerned with making the pedagogical ideas of philosopher Johann F. Herbart fruitful for the shaping and profiling of a scientific pedagogy. The elaborated

positions became known worldwide by means of international networks. For example, the *pedagogical seminars*<sup>iii</sup> Ziller established in Leipzig and Stoy in Jena, which Rein continued after Stoy's death, achieved international fame. Jena also played a special role in terms of international reception, since large numbers of foreign students, including many Americans, attended these annual summer courses (Graff & Schotte, 2009). In this way, the ideas, theories, and conceptions of Herbartianism also entered the educational discourse in the United States. They were disseminated as well as adapted to the developmental presuppositions.

Charles McMurry was a high school graduate of Illinois State Normal University who went on to earn a degree in classical studies from the University of Michigan. After returning to Illinois in 1882, he was persuaded by a colleague to go to Halle to study economics and theology (Dunkel, 1969b). Through conversations with Charles DeGarmo, he also became interested in the educational ideas of the Herbartians. He studied at Halle for three years and completed his studies with a doctorate in 1888 (McMurry, C., 1888). Frank McMurry, Charles's younger brother by five years and also a graduate of the high school program at ISNU, followed his older sibling to Europe in 1886 to study education. After spending a year together in Halle, Germany, they both went to Jena, Germany, in 1887 to attend the Pedagogical University Seminar under Rein. Rein was also the supervisor of Frank McMurry's dissertation (McMurry, F. 1890; Dunkel, 1969b). The experience of integrating theory and practice impressed the brothers so highly that they made it their mission to introduce Herbartianism into American discourse in the 1890s.

The works that should be highlighted are *The Elements of General Methods Based on the Principles of Herbart* (1892), written by Charles McMurry, which boasts impressive figures. Furthermore, *A Course of Study for the Eight Grades of the Common-Schools* (1895b), as well as *Method of the Recitation* (1897), jointly written by the McMurry brothers, should be mentioned, which ties in with Rein's thought in terms of the presentation of subject matter on a conceptual level.

### **Theoretical perspective and methodological approach**

The present paper is based on the conceptualization of cultural transfer research (e.g. Espagne, 1999, 2003; Espagne & Middell, 1999; Espagne & Werner, 1986; Lüsebrink &

Reichardt, 1997; Middell & Middell 1994; Middell, 2000, 2008). This conception can be understood as a version of the *cultural turn* (Keller, 2006).

While older approaches mostly emphasize national or regional autonomy, ignoring the elements of *foreignness* in one's own culture, this approach focuses on the numerous linkages and transitional phenomena between cultural areas (Keller, 2006). The subject matter is the multiform processes of penetration and reception in the context of an exchange between cultural areas. The concrete interactions between social groups and their respective cultural practices, as well as the dynamics and modalities of intellectual and cultural exchange processes, are analyzed and described (Middell & Middell, 1994). The approach also addresses the motives for acquiring "foreign" knowledge, the criteria guiding the selection, and the purposes for which the acquired information is used (Paulmann, 1998). Transfer research focuses on the specific constellation of the source and the receiving culture. In doing so, the traditional perspective of cultural comparison is reversed. The introduction of a cultural good into another context would not only be related to targeted expansion efforts of the source culture, but also to a demand in the receiving country. In this understanding, cultural transfer is an active appropriation process that is controlled by the respective host culture (Middell & Middell, 1994).

Furthermore, following Schriewer (1992), a functional perspective on educational transfers is adopted. This perspective enables a conceptually adequate description of transfer processes by applying the theory of *reflection problems of systems* (Luhmann & Schorr, 1979). Of particular relevance is the principle of *self-reference of systems*; this is applied to issues in international comparative education (Schriewer,

1992). Hence, Schriewer points to three different modes of externalization used to generate *additional meaning*: reference to (1) scientificity; (2) values and tradition; and (3) organization. Applying the externalization concept of self-referential systems theory provides an explanation for phenomena studied within a transfer research framework. It can make clear when and why educational systems resort to externalized references in order to initiate and force their own development. The basis for the methodological procedure is the content-related, qualitative analysis of selected writings of the protagonists in the sense of source work and criticism. In doing so, a subject-oriented methodology, which follows a text-based hermeneutic logic of cognition, is used as a level of reflection. Furthermore, a comparative-constructive procedure is applied. It is criterion-guided between the teachings of the two US-American protagonists and that of Wilhelm Rein as the German exponent of Herbartianism. The two US-Americans represent, in a figurative sense, a personified transfer channel through which the exchange or transplantation takes place. It should be noted here that the two U.S. educators simultaneously represent the medium in which the transformation processes take place in a respective individual determination by external factors.

The selection of the protagonists and their ideas as the object of study in the case of Wilhelm Rein as a representative of Herbartianism results from the fact that research in the US-American context proves the thesis that Herbartianism, as represented by Wilhelm Rein, is of central importance for the US (Dunkel, 1970). In case of Charles and Frank McMurry, it is the fact that they present themselves as US-American Herbartian exponents, since both demonstrably studied

under Rein in Jena and were strongly oriented toward his ideas and conceptions.

### **Formal Stage Theory sensu Wilhelm Rein**

The basic conception of the formal stage theory sensu Wilhelm Rein is that the working through of the material takes place on the basis of five formal stages, which Rein refers to in their entirety as the articulation of instruction.

The learning process as such can be divided into two phases. One consists of the process of *apperception*, which means the ability of the mind to form clear ideas from sensory perception and to combine the manifold impressions into a unified imagination through the activity of the inner sense. The other is the process of *abstraction*, which means to elaborate the imaginations to abstract notions. However, both the first part of the learning process, the acquisition of an *apperception*, and the second of conceptual formation can only be achieved if each of the two is accompanied by a preliminary stage (Rein/Pickel/Scheller 1888, p. 40).

In detail, this means that the presentation of the new concrete imaginative material must be preceded by a stage of preparation. In the case of the preparation of the conceptual understanding of the new, a linking of the new with the old is required, by which is meant that the older thought material of the students is activated by the preparation (Rein et al. 1888, p. 41). This complex of teaching tasks described here, however, must be preceded and followed by something. These are, on the one hand, the specification of the goal and, on the other hand, the application. For Rein, the latter results from the fact that it is necessary to bring the student to work independently, willingly and conscientiously to achieve the educational goal. Summarizing the basic tasks of the formal stages, Rein writes:

According to this, instruction in each methodological unit takes the following course. It must first state the goal and then:

1. to introduce and prepare the new workload through a preliminary conversation,
2. to present the new content itself,
3. to compare and link the same among themselves and with older things,
4. to derive the conceptual results and to compile them in a systematic order and
5. to transfer the acquired knowledge into use (Rein et al. 1888, p. 41).

The subsequent designations Rein provides for his conception are:

1. preparation or preliminary conversation,
2. presentation (of the new),
3. linking (of the learned among themselves and with others),
4. summary (of the conceptual) and
5. application (of the general gained)" (Rein et al. 1888, p. 41).

In the following, let us take a closer look at the conceptualizations Rein operates with in his conception of formal stage theory. At the beginning of a unit belongs the *disclosure of the goal* of learning, which should be reached at the end of the work through. How the *goal* is presented can have different forms, such as a sentence, an orientation question or a concrete task, but it must not lack factuality, and it must always take into account the aspects of gaining the students' interest (Rein et al., 1888). For Rein, the basic rationale for *preparation* as the first stage is that no interest can be generated in the student without a connection to the student's older ideas (Rein et al., 1888). Therefore, it prepares the stage of *presentation* in such a way that it takes up the existing thought material of the students and prepares it for the presentation

of the new. The separation of these two stages must be strictly observed (Rein et al., 1888).

The *presentation* has to ensure that the presented material in connection with exercises is not only understood momentarily, but also undergoes a stable acquisition. The forms of presentation must be appropriate to the material being taught. The purely factual content of the new is worked out in the form of a conversation. The substances in themselves are not yet evaluated further. They serve to give the students a clear idea of the new material. The new should be brought into connection with what is already present in the mind of the students and, above all, is *sufficiently* similar to this in order to achieve a sensualization of the new in the students' mind. Finally, each section as well as the entire unit are to be repeated several times in the sense in order to achieve memorization and fusion of the new with the old (Rein et al., 1888). All of this has to make sure that the process of *apperception* can fully take place.

In the stage of *linking* the thought connections are to be selected, by which a separation of the conceptual material can be achieved (Rein et al., 1888). That means for Rein, "the linkage is not extended, however, haphazardly to everything what allows such a linkage at all. Rather, the attention should always be directed only to valuable associations of thoughts. Worthless associations are playfulness, a waste of time without purpose" (Rein et al. 1888, p. 58). In doing so, it already introduces or prepares the next stage of the *summary*. The process of *abstraction* has thus been initiated. It must now be continued and brought to a conclusion. The stage of *summary* is planned for this purpose. Within this stage, the existing generalities are to be worked out more strongly, in order to probe them completely from the concrete. Thus, at this stage, through summary and generalization, the

process of concept formation from a majority of individual conceptions is to take place. The connectedness of the concrete from the general is still present and should not be completely dissolved in consciousness (Rein et al., 1888). In the process of *abstraction*, the distinction between *psychological* and *logical* concepts plays a significant role. The psychological concept stands for the existence of a correct general idea. The logical concept stands for the fact that a definition has been established and internalized (Rein et al., 1888). With regard to teaching children, Rein states that in the context of teaching, one must mostly be satisfied with the psychological concept.

In order to gain value for the actual life, actions, and deeds of the students, the results of the conceptual work have to prove themselves in *application*. This includes exercises designed to relate closely to the actual problems of the students' present and future lives. On the one hand, the potential of knowledge, which is bundled in the conceptual series, and of ability should be secured and promoted. On the other hand, ethical-moral judgments are to be practiced, which lay the foundation for the development of a moral-religious character, in order to fulfil the claim of a school as a school that not only wants to impart knowledge, but also wants to educate. Therefore, the teaching in school must be a form of teaching that wants to educate, which Herbart and the Herbartians called *Erziehender Unterricht*. By this, it is meant that, first, the student learns to apply the knowledge gained in class to concrete decision-making processes. This involves making appropriate judgements based on imparted knowledge, if possible, in the course of action. Secondly, *Erziehender Unterricht* means those influences of an educative nature, such as praise, encouragement, help, counseling, etc., which emanate from the person of the teacher and constantly permeate all teaching. It is important

to note that it is not only the intentional measures that come from the teacher that play a role, but also the more functional ones, such as situations of play, work and competition, as well as the stylistic forms of teaching, which also have a far-reaching educational effect. Situations of success or failure also produce educationally significant influences of an encouraging or discouraging nature. Finally, in a third particularly important sense, *Erziehender Unterricht*, means attitudes and skills formed in the context of experiences are inherent in all teaching.

### **Formal stage theory sensu Charles and Frank McMurry**

The interpretation of the formal stage theory is most elaborated in the work *Method of Recitation*, jointly written by the brothers Charles and Frank McMurry.<sup>iv</sup> The foundation of the theory element, however, was laid by Charles McMurry in the first edition of the *General Methods of 1892*, in which he deals with the concepts of *induction* and *apperception*. These two terms are directly related to the learning process and the methodology of the course. Therefore, the analysis of the two concepts of *induction* and *apperception* will precede, since the specific interpretation of the McMurrays' formal stage theory is derived on the basis of this point of view.

The study and determination of the concept of *induction* inevitably represents a psychological investigation for McMurry. Within the analysis, the natural learning process is to be determined, focusing on the study of the processes of the child's mind (McMurry, C., 1892). As basic operations within the child's learning processes, McMurry identifies the constant contemplation of the environment. This observation leads to the comparison of different objects and individuals with each other. Based on this, these objects and individuals are

classified under general rules and concepts (McMurry, C., 1892).

In the *Method of Recitation*, this context invokes Henry T. Huxley, the English biologist and influential supporter of both Humean empiricism and Darwinian evolutionary theory (1880). Huxley called the inductive process of knowledge the general process of knowledge in the natural sciences (McMurry, F., 1897). This type of process of knowledge generation is postulated by the McMurrays for all studies:

In short the inductive process is a natural highway of human thought in every line of study bringing all the mental forces into orderly, successive, healthful activity (McMurry, C. 1892, p. 127).

According to McMurry, this postulated generality of the inductive process for the genesis of knowledge can therefore be translated in terms of teaching methodology, since it is valid as a methodological principle for all studies. Considered as a whole, the inductive process is characterized by *absorption* and *reflection*, which are the natural rhythms of the mind in the context of acquiring and elaborating bodies of knowledge within the learning process (McMurry, C., 1892). The effect that occurs within this process is that of building abstract mental concepts that organize knowledge. From the more specific analysis of the inductive process and its course, two stages emerge, which he determines as *observation* or *intuition*, direct perception of the realities of the environment through the senses or consciousness (McMurry, C., 1892). The second step is determined by comparing and relating the individual elements and general concepts derived from them.

The second stage in this inductive process, *reflection*, then involves comparison, classification, and abstraction. McMurry discusses these processes from the standpoint of the “association of ideas” (McMurry, C., 1892, p. 141). It goes beyond the usual understanding of

knowledge acquisition and manifests itself in the elaboration and assimilation of knowledge content, which should lead to a deeper understanding and support the further learning process (McMurry, C., 1892). Both processes are based on the above-mentioned concept of association of ideas, which is closely related to the theoretical element of *apperception*.

The mode of *apperception* is thereby such that it represents the transformation of a newer and thus also weaker mental concept by an older one, which is characterized by a higher level of elaboration and thus surpasses it in internal organization. This shows its process character, which is set in motion by the dissimilarity of the already existing imaginative complexes and the new. *Apperception* is thus the reaction of the old to the new, showing in it the preponderance of the older, firmer, and self-contained conceptual groups in contrast to the concepts that have just entered consciousness (McMurry, C., 1892).

The exception is completely new knowledge, which must first be made manageable by *perception* or *intuition*. The great yield within the learning process under the consideration of this psychological concept results for McMurry from the fact that “apperception, therefore, has the same final tendency that will be observed in the *inductive process*, the unification of knowledge, the concentration of all experience by uniting its parts into groups and series” (McMurry, C. 1892, p. 116). For McMurry, the final stage of the inductive process is the formulation of general laws (McMurry, C., 1892).

The McMurrays very specifically and explicitly oppose the opinion that pedagogy cannot be a science and want to prove this by stating that there are universal methodological principles that provide the basis for the *science of education* (McMurry, C. & McMurry F., 1897). In the case of the McMurrays, this implies a

strong orientation to the reference discipline of psychology, which studies the laws of the learning process and thus provides the basis for teaching methodology. This should make it possible to exclude chance as far as possible and to make pedagogical and instructional action plannable, whereby the laws of the child's learning process are fundamental and are to be moved to the center of the methodology.

How do the McMurrays formulate their position on teaching methodology? It has already been clarified above that they understand the learning process as an inductive process based on *intuition* and the *association of ideas*; whilst considering the law of *apperception*.

For this purpose, the distinction between *individual notions* and *general notions* is introduced. The former are the notions of a particular, a concrete, and the latter are the general notions abstracted from the concrete. Within the *general notions we have to distinguish between *psychical notions* and *logical notions* (McMurry, F., 1897). *Psychical notions* denote subjective ideas or concepts bound to the individual, which are mostly characterized by vagueness, whereas *logical notions* represent abstract ideas or concepts. It is degrees of abstractness that distinguish these two types of general notions from each other, and progress in the learning process is linked to and occurs in the ascent from *psychical* to *logical notions* (McMurry, F., 1897).*

The law of apperception is of decisive importance in the question of the development of *individual notions*. This means that the new knowledge must be compatible with the already existing knowledge (McMurry, F., 1897). At the *preparation* stage, it is important to activate the previous knowledge as extensively as possible and to take into account the significance of the feelings for the cognitive activation and to detect and use the emotional connection with a body of

knowledge in the child's subjectivity.

Furthermore, it must be taken into account not to bridge to the new too quickly within this activation, but to make sure that the intended stock of knowledge has fully entered consciousness. Furthermore, the differentiation between already existing knowledge stocks and the new ones has to be carried out clearly. In addition, it is important to fundamentally channel the attention in this phase or at this stage and to attune it to the material to be dealt with. The methodical means of the *statement of the aim* should be used (McMurry, F., 1897).

The second stage is about initiating the apperceptive process and supporting it as best as possible. Within this stage, the methodological design can be very variable. Thus, it can consist in reading a story, studying a map, drawing something or carrying out a small experiment, on the premise that they deal with a new concrete object of learning (McMurry, F., 1897).

In this context, we now introduce what the McMurrays call the *developing method* and distinguish it from the lecturing and textbook or text-based methods (McMurry, F., 1897). This propagated method is closely related to the figure of thought of the learning process as an inductive process, which is aimed at finally elaborating *general notions* or the *general truths* of the respective study, based on the *self-activity* of the students. The importance of this *self-activity* as a cognitive activation and the self-construction of knowledge is underpinned by the reference to Herbert Spencer (McMurry, F., 1897). The justification of the *developing method* as the most functional for achieving this overarching learning goal stems from its functionality in terms of the critical reference norms through which this learning goal is operationalized. They consist in arousing interest, thereby stimulating students' minds to ask their own questions, using their own words (McMurry, F., 1897). This means that the



answers that the teaching aims at must be answers to questions that the students ask themselves. Only in this way can the intermediate goal of the learning process, the development of clear *individual notions*, be achieved.

Following the first two stages, the question now arises, after the *individual notions* have been developed in the consciousness of the students, how to proceed from these *individual notions* to the *general notions*. That is, how does the *process of abstraction follow on from the process of apperception*, and how is one to be linked to the other?

In the sense of the inductive understanding, it is therefore necessary to initiate the process of abstraction and to support the passage from the particular *individual notions* to the abstract *general notions*, which materialize in the form of definitions and take place through the intermediate stage of abstraction on the basis of the comparison of the *individual notions*. With regard to a complete inductive process in the scientific sense, in pedagogical practice this must be abbreviated at the point of comparison, *comparison* and *abstraction*, because otherwise it would go beyond the time frame that is structurally given in school context. For this purpose, the concept of *types*, already introduced above, is used and thus an element from the theory of curriculum is made fruitful for teaching methodology (McMurry, F., 1897).

In connection with the following stage, the understanding of the learning process as an inductive process appears on the one hand and on the other hand the strong formalization of this understanding in the spelling out of the stages as instruction as well as the clear setting of abstract knowledge as the goal. The inductive understanding becomes visible when it is emphasized that the complete comprehension of the concrete represents the indispensable

foundation on the basis of which only everything else can take place and the inability to be able to explicate ideas or conceptualizations is not due to a possible lack of linguistic competence, but the lack of clarity of the respective idea is causally responsible for it. The formalization of the teaching process becomes clear if it is decidedly spoken of preceding *steps of instruction*. The fourth step of formulating the definition, the law or general rules should be the direct result of the children's own previous thinking (McMurry, F., 1897).

The last question and the last stage connected with it deals with the question of the application of the *general notions*, which is determined at this point as the greatest difficulty in the learning process and which is indispensable as a component of the learning and thus also of the teaching process (McMurry, F., 1897). This stage and the learning process carried out in it are called decidedly deductive (McMurry, F., 1897). The mastering and the deeper understanding of the *general notions* is inevitably linked to their application and, with reference to John Locke, presented as a necessary step, since only knowledge that is and can be applied may be considered real and effective knowledge (McMurry, F., 1897).

### Comparison

In formal or theoretical respect, the formal stage theory as spelled out by Rein is followed in extraordinary agreement. This is shown at the same time in the presentation of the first stage, when the function of activating already existing ideas is ascribed to it. Within this stage, the factual content must necessarily be made transparent to the students and placed at the beginning. The coupling or the justification of the necessity of the preparation as the first stage is also determined in accordance with Rein in the psychological figure



of thought of apperception as a law of the learning process.

With regard to the second stage, the McMurrays adopted almost verbatim the methodological design of the formulations found in Rein. It is pointed out that the methodical design must be oriented to the (scientific) material; under the premise that the students deal with a new concrete learning object, whereby the apperceptive process is to be supported.

The third stage for the McMurrays, as for Rein, is for linking, based on comparison, which initiates the process of abstraction. For Rein, this involves making the valuable connections of thought the McMurrays seek to secure through their notion of *types*, which can extract the comparison more quickly and effectively in terms of the valuable connections and lift them into consciousness (Scholz, 2020).

The fourth stage is now responsible for deriving the conceptual results and putting them into a systematic order, that is, for completing the process of abstraction and for working out the existing generalities more strongly from what is linked and for probing them entirely from the concrete. The McMurrays refer to this as the transition from *individual* notions to *general notions*, which Rein conceptually agrees is the transition from individual notions to general notions. In this context, Rein makes a further differentiation of the abstraction process within the learning process by distinguishing a higher and a lower level of abstraction. Thereby, the higher level again breaks down into *psychological* and *logical* concepts, which finally represents a three-part gradation of the abstraction process. There is a further congruence of the thought figure here, since the McMurrays in their discussion of the process of cognition as an inductive process also make such a distinction in *individual* notions, as those of the ideas of a certain, a concrete, and on the

level of *general notions* between *psychological notions* and *logical notions* (McMurry, F., 1897).

The stage of application of the results of this conceptual work has with the McMurrays, again in agreement with Rein, now the function of revealing that this work has a value for the actual life, the acting and doing of the students. This means that with both, Rein and the McMurrays, the concrete arrangement be fundamentally oriented to the mental movement between the abstract and the concrete and thereby, on the one hand, the inductively gained *general notion* must be referred back deductively to the preceding path of knowledge and, on the other hand, the abstract knowledge must be related to new problems, but also to other learning objects also from other studies and must be used for the solution of the problems or the development of other learning objects. This addresses the most significant aspect for the present paper, which has already been mentioned above and which needs to be made explicit. It is about the basic (psychological) interpretation of the human cognitive process, which is determined by the McMurrays in the scientific theoretical location within the scientific paradigm as a decidedly inductive process and this understanding is applied to the teaching methodology. Although Rein's understanding can also be described as thoroughly inductive and the lower levels follow this logic of cognition in that he determines the goal of teaching in the acquisition of abstract concepts and the path to this goal is an inductive one, no reference to scientific methods can be found in his works in this context (Scholz, 2020).

It could be shown that the McMurrays followed in extraordinary agreement the formal stage theory as advocated by Rein. There was agreement in the definition of the element of goal statement, which was taken over almost verbatim from Rein in its constitution and

justification, and in the coupling or justification of the necessity of preparation as the first stage in the psychological figure of thought of *apperception* as a law of the learning process.

The McMurrays also refer to the Herbartian distinction between *deepening* and *reflection* within the learning process and its didactic-methodological embedding (Scholz, 2020). A further agreement could be found in the basic figure of thought of the learning process aimed at by teaching from the *individual* notions to the *general notions*, which is termed in Rein's conceptual agreement as transition from individual notions to general notions. Rein's further differentiation of the abstraction process within the learning process into abstractions of higher and lower degree, whereby the higher degree again breaks down into *psychological notions* and *logical notions*, could be demonstrated by the McMurrays in the context of their discussion of the cognitive process as an inductive process in the form of the differentiation of the *general notions* into *psychological notions* and *logical notions*. Contrarily, with regard to the relevance of the stages for the *moral* or, in Rein's case, *moral-religious* development of the students, it was found that this was only addressed selectively, whereas in Rein's case this implementation and reference developed continuously (Scholz, 2020).

### Discussion

The central finding for the present contribution was the McMurrays' interpretation of the human cognitive processes and the subsequent understanding of the formal stages. This interpretation was characterized by the science-theoretical location within the natural science paradigm.

This becomes most obvious when they refer to the English biologist, empiricist, and evolutionary theorist Henry T. Huxley, who

called the inductive cognitive process the general cognitive process of the natural sciences and wanted to postulate it as universal for all studies and translate it in terms of teaching methodology, again drawing heavily on psychological research. This is particularly evident in the justification of *general notions* as the goal of teaching. The explanation for this is twofold. On the one hand, invoking this body of thought provides a possibility of communicative connectivity in discourse and thus the generation of communicative resonance (Treml, 1997), since especially before and around the turn of the century there was a decided turn toward and preference for empirically and evolutionarily grounded scientific views of human beings and their education in U.S. educational thought (Krenzer, 1984). On the other hand, it was apparently a functional strategy for the McMurrays to substantiate the scientificity of pedagogy and thus likewise to find a convincing argument for their position and the enrichment of their self-reference with *additional meaning* (Schriewer, 1992). Here, a transcultural moment becomes visible as an internal logic of U.S. educational thought is drawn upon. The transcultural dimension of the history of ideas becomes particularly clear when one looks at the references in general that are cited to support one's own position or that are used to spell it out. Thus, German-speaking authors as well as English theorists such as Huxley and the often-cited Herbert Spencer, but also decidedly U.S. American participants in the discourse, above all the extremely influential William T. Harris, were taken into account. The logic behind this is characterized by the fact that self-reference is enriched with *additional meaning* (Schriewer, 1992) by means of foreign reference in order to lend authority to one's own position and to increase the chance of nobilization in the discourse. This means that the *international argument* (Gonon, 1998) or

the *foreign country as argument* (Zymek, 1975) as well as decidedly US-American positions and thus a discursive *internal logic* were used. Nevertheless, it should be noted that in Herbartianism there is a strong emphasis on psychology and reference to a theory of mental and cognitive processes, which was quite compatible with a psychologization of educational science. However, this is not mentioned or made strong by the American protagonists at any point.

The case study can thus show what role the establishment of communicative connectivity and resonance as well as the functional strategy of referring to scientificity have for generating additional meaning for the embedding and concomitant transformation of a pedagogical theory in the context of a transfer. Moreover, it can be shown that it is these strategies, as it were, that are responsible for semantic shifts.

The McMurrays point out in the context of the Method of Recitation that it is indeed based on the principles of teaching as elaborated by Rein and Ziller. However, they insist that it is not a thoughtless imitation of foreign methods and that the whole conception springs from American conditions (McMurry, C. & McMurry, F., 1897). Here the parallels between the different modes of explication of one's position become clear. At the same time, it is pointed out that a foreign position is referred to as the basis of one's own, representing the strategy of *foreign as argument* (Zymek, 1975); whilst the genesis of one's own position from domestic dispositions and domestic logical requirements based on it is emphasized. Finally, the eclectic and thus also fuzzy reference to various authors and positions emerges, which are finally unified as Herbartian principles. In this approach, at no other point is a meta-perspective taken on the spelling out and its interweaving with the various positions.

Furthermore, the phenomenon of translation problems appears in several places. From the fourth edition of *General Methods* on, the McMurrays themselves point to an aspect of analysis that is generally virulent for cultural transfer research. Thus, a significant mode within the transformation of pedagogical theories is represented solely by linguistic translation and the accompanying reformulation of semantics, which complicates reception in the receiving context and potentially leads to misunderstanding (Shimada, 1997; Röttger-Rössler, 1998). McMurry writes about this in a later edition:

Intuition is popularly used in a sense different from the above. We are in need of a word which has the same meaning as the German word *Anschauung*, for which there is no popular equivalent in English (McMurry, C. 1895a, p. 160).

This represents one of the few places where McMurry takes a meta-perspective on his own thinking in relation to the development of his pedagogical thinking, based on intercultural transfer and the concomitant transnational and transcultural character of his theorizing. In the other direction, it is the reference to the term *recitation*, the use of which is irritating. Especially since the McMurrays were firmly against the practice of recitation as a teaching methodology and wanted to develop the teacher's competence independent of textbooks. Why not the term *Instruction* or simply *Teaching*? At this point, the problematic nature of bilingual text-based analysis within a cultural transfer becomes clear. For Recitation at this point can by no means be translated in the meaning of *reciting*, but rather characterizes the combination of inductive and deductive steps as a teaching methodology based on conversation, which can best be translated as *questioning-developing teaching*. The choice of this terminology is thus quite deliberate and already

indicates the general line of thought regarding the methodological design of teaching.

In the field of international educational science and pedagogical contacts and networks in the 19th and early 20th centuries in the context of inter- and transnational development dynamics of pedagogical positions, practices and educational systems, there is still generally a great need for research. This is true for international Herbartianism research as well as for reform pedagogical approaches in general. The kindergarten movement, for example, can be seen as an exceedingly interesting object of study within a cultural transfer research, because “German and American kindergarten activists stayed in contact, visited each other, and often used the differences in their situations and ideas as a basis for cross-cultural dialogue” (Allen, 1995, p. 85). Therefore, a development of pedagogical theory based on direct interdependencies between different cultural areas could be investigated and the transnationality and transculturality of a pedagogical theory and its development could be focused on.

## Notes

i Text-hermeneutic is a typical methodological approach for the interpretation of texts. It is a methodology of continental European tradition and provenance. It involves a reflective approach to the process of interpreting texts and thereby directs attention to the subjective character of interpretations and contingency of interpretations.

ii Beyond a pedagogical Herbartianism, one can also speak of a philosophical and a psychological Herbartianism (Blichmann, 2013). It would therefore be misleading to define the pedagogical current following Herbart's teaching

in a shortened way as Herbartianism. That is, it must be specifically determined as *pedagogical Herbartianism*. Since the focus of the present work is on this pedagogical Herbartianism, in the following, when the term Herbartianism is used, it will mean pedagogical Herbartianism, which, however, is closely related to philosophical- and psychological Herbartianism. Furthermore, the notion of Herbartianism as a homogeneous pedagogical theory is equally misleading (Dollinger et al., 2010).

iii The pedagogical seminars were a special format for teacher training and were intended to contribute to the professionalization of teachers. It consisted of four parts: *Theoretikum*, *Praktikum*, *Kritikum* and *Konferenz* and had a school for exercises of the students connected to it, which was very special at the time. The *Theoretikum* complements Rein's lectures on pedagogy. Here, pedagogical literature and independent works of the members are discussed. During the *Praktikum*, a regular member gives a lecture in the classroom in front of all other seminar members. In the *Kritikum* the teaching samples are discussed. In the conference, issues of school life are discussed. These include, for example hygiene or morals of individual students, school rules or the purchase of teaching aids.

iv Regarding this work, it should be noted that the brothers wrote the introduction together and divided the other chapters among themselves. Thus the chapters I, II, IIX, XI, XII, XIII, XIV and XV were written by Charles McMurry and the chapters III, IV, V, VI, VII, IX and X by Frank McMurry. The result for the citation method is that always the author is named after the corresponding year, who is named for the chapter from which the indirect or direct quotation comes, with the corresponding page number. In the case of the introduction, both

authors are cited. Even though the McMurrys divided the chapters among themselves, the respective viewpoints in the chapters may apply to both authors.

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