Quality, Social Justice and Accountability in Education Worldwide

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Bulgarian Comparative Education Society

This is a peer review book. The relevant part editor and the editor-in-chief decide which papers to be reviewed. Each paper is then reviewed by at least two reviewers. Members of the International Advisory Board are also involved in the peer review process. Finally, the six-member International Editorial Board takes decisions on papers to be included in the book.

Contents

Part 2

Pre-Service and In-Service Teacher Training & Learning and Teaching Styles

Part 3
Education Policy, Reforms & School Leadership

Part 4
Higher Education, Lifelong Learning & Social Inclusion

Part 5

Law and Education: Legislation and Inclusive Education, Child Protection & Human Rights Education

Part 6
Research Education: Developing Globally Competent Researchers for International and Interdisciplinary Research

Editorial Preface

The Annual International Conference of the Bulgarian Comparative Education Society is now running in its thirteenth year. From its modest beginnings thirteen years ago, to its impressive size today, a remarkable tradition has been the production of a conference book, consistently launched on the first day of the conference each year.

This year, Volume 13 of BCES Conference Books is published in 2 numbers. Number 1 of the volume contains papers submitted to the XIII Annual International Conference of the Bulgarian Comparative Education Society (BCES), held in Sofia, Bulgaria, 10 – 13 June 2015. Number 2 of the volume includes papers submitted to the III International Partner Conference of the International Research Centre (IRC) 'Scientific cooperation', Rostov-on-Don, Russia. Such a partner conference has been organized as part of the BCES Conferences for the past three years.

The XIII BCES Conference theme is *Quality, Social Justice and Accountability in Education Worldwide*.

The book consists of an introductory chapter by JP Rossouw and 58 papers written by 91 authors that are grouped into the following 6 parts:

Part 1: Comparative Education & History of Education;
Part 2: Pre-Service and In-service Teacher Training & Learning and Teaching Styles;
Part 3: Education Policy, Reforms & School Leadership;
Part 4: Higher Education, Lifelong Learning & Social Inclusion;
Part 5: Law and Education: Legislation and Inclusive Education, Child Protection & Human Rights Education;
Part 6: Research Education: Developing Globally Competent Researchers for International and Interdisciplinary Research.

In his introductory chapter "Quality, Social Justice and Accountability – Crucial Determinants of Excellence in Education" JP Rossouw discusses how "the quality of education, social justice and accountability can be regarded as key elements of successful school systems and societies". The central claim of his piece is "that a categorically successful education system succeeds in providing an education of a quality higher than mere accessibility, in which social justice is achieved for the students, teachers and the society. These ideals can only be accomplished if a high level of accountability, as is expected by those stakeholders who expect an individual, department or institution to give account of own actions, prevails amongst all role-players" (Rossouw, p. 17).

Part 1 boasts 11 papers. The first paper, "The Crisis in World Education and Comparative Education" deals with a book with the same title, edited by the authors of the paper, Charl Wolhuter, Konstantinos Karras and Pella Calogiannakis. In the next paper Teodora Genova zooms in on a part of the life of Torsten Husén – one of the towering figures of Comparative Education, whose life and writings and work spans the entire twentieth century. Getting the world of work and the world of education in tandem, has been described as the Gordian knot of education and of

education planning, something Comparative Education is not anywhere near providing an answer. In an era of growing graduate unemployment in large parts of the world, Marco Aurelio Navarro Leal and Ruth Roux's paper on the remuneration of Law and Engineering graduates in Mexico must surely rate as highly topical. Despite lofty rhetoric about Human Rights, media reports regularly remind us that many schools are unsafe spaces. In his paper JL van der Walt offers a new perspective on safe schools, based on the Capabilities Approach philosophy of Martha Nussbaum. The wide range and adjustable borders of the field of Comparative Education is once again demonstrated in Ferdinand Potgieter's paper, invoking insights gleaned from Philosophy of Education, in enriching Comparative Education as it focuses on the issues of religious tolerance and education. In his paper, Jan Nieuwenhuis links to the paper presented by Ferdinand Potgieter in the same thematic section in 2014. Nieuwenhuis problematises the pedagogy of discernment, advanced by Potgieter in his paper in 2014.

Takehiro Hirayama turns to a topic and region both much neglected in Comparative Education scholarship, namely schools in Bhutan before the modern age. The History of Education subpart is given further substance with Regan Treewater-Lipes' paper which, located in Istanbul and Jerusalem, as the paper of Takehiro Hirayama, gives attention to parts of the world too often neglected in world education historiography. The final paper in the History of Education subpart is Arijana Kolak Bošnjak's on Gymnasium education in nineteenth century Croatia.

Hennie Steyn links to the issue of quality touched upon by Arijana Kolak Bošnjak, in his paper on benchmarking for teacher education programmes, and finally Ntlantla Sebele throws the spotlight on the vexing, but too often ignored, problem of formulated and implemented policy gaps. In sum, eleven papers making an interesting and memorable thematic unit for 2015.

Part 2 includes 10 papers dealing with the issue of teacher education and training at different levels of the educational system. In spite of the fact that the national contexts of the presented studies differ to a great extent, they all however reflect the fact that teachers today face many challenges brought about by both, student heterogeneity and by demanding social expectations.

The part opens with the presentation of the findings of a comparative qualitative study conducted at two universities in Slovenia and Serbia. The authors, Klara Skubic Ermenc and Nataša Vujisić-Živković discuss the controversial competence-based approach which has been introduced with the Bologna process in the pedagogy study programmes. In her second paper Klara Skubic Ermenc discusses the education of teachers for intercultural education, and proposes a model of teacher education for intercultural education. The model is based on a definition of interculturality as a pedagogical principle that guides education to enable recognition and empowerment of all minority groups.

Amanda S. Potgieter argues that the liminal experience of transition of students into academia is not primarily dependent on intelligence and effort, but on the provision of educative nurturing space in which the mentor-lecturer together with the students engage meaningfully with socially rich experiential learning.

Slavica Maksić's paper "Teachers' Perceptions of and Solutions for Student School Failure" reports the results of a qualitative study exploring the relationship

between primary school teachers' perceptions of student school failure and the solutions suggested for its overcoming.

Johannes A. Slabbert reflects on the effects of the publication of *The Oxford Handbook of Philosophy of Education*, edited by Siegel in 2009. The publication evoked considerable discourse in the fields of philosophy and philosophy of education and prompted the question about the role of philosophy of education in the practice of education and teacher education.

Sandra Ozola and Inga Riemere discuss the impact of the rapidly changing world on education and on the teachers' professional role. A traditional approach to teaching which involves the directed flow of information from a teacher to students is no longer productive; the teachers need to enable people to become lifelong learners.

The initial and in-service teacher education play a vital role in strengthening competences necessary for implementing inclusive educational practice, claim Nataša Matović and Vera Spasenović. They analyze in-service training programs for educators in the field of inclusive education in Serbia.

Bekir Fatih Meral similarly discusses the issue of the integration of students with special needs into mainstream education. In Turkey regulations that guide the integration are in place, however, there is a huge gap between law and practice.

Milintra Kawinkamolroj, Charinee Triwaranyu and Sumlee Thongthew present a research aimed to develop coaching processes based on transformative learning theory for changing the mindset about instruction of elementary school teachers.

This part closes with the paper by Nadrudee Chitrangsan, Wichai Sawekngam and Sumlee Thongthew, in which the authors discuss a curriculum management process by applying Lean concept for waste elimination to enhance curriculum implementation for primary school teachers.

Part 3 includes 12 papers whose themes are related to the problems of leading and providing quality education and an examination of recent educational policy initiatives in various countries. Authors come from Mexico, Bulgaria, Croatia, Serbia, Turkey, England and South Africa.

Teodora Genova presents an overview of the current situation and reforms making way for future positive developments in the national education system of Bulgaria. Živka Krnjaja critiques the quality of the curriculum framework for early childhood education in Serbia, discussing the importance of preschool education worldwide and evaluating Serbia's preschool education curriculum framework, examining policy documents against internationally accepted quality criteria which shows discord between the preschool education curriculum framework in Serbia and the characteristics of high quality contemporary preschool education programmes. Dragana Pavlović Breneselović produces a comparative analysis of early years' education in the Republic of Ireland and Serbia, examining national documents against four different dimensions. The final conclusion is that in Ireland quality is seen as a building process whereas in Serbia it is seen as a way of measuring and controlling early years' education. Emina Hebib, Vera Spasenović and Zorica Šaljić discuss the ways in which evaluation is carried out on elementary, secondary and higher education levels in Serbia.

Fran Galetić presents an analysis of different governments' policies on education expenditure across the European Union by comparing the variation of education spending in relation to the percentage of each country's gross domestic product (GDP) allotted to education. The paper makes clear how varied are the amounts of GDP spent on education across the EU.

The theme of policies for improving social justice is presented by Snježana Dobrota, related to how a multi-cultural approach to music education can enhance social justice and by Ural Nadir and Mehmet Can Aktan who examine social justice in Turkish education via an exploration of how the welfare state, social justice and school social work interact in their country. From Mexico, José Luis Andrade, Amelia Molina and Christian Ponce present an overview of curriculum flexibility as a strategy for exercising social justice in public universities, taking into account the preparation of students for the job market in the context of globalisation. Claudio-Rafael Vasquez-Martinez et al. focus on education as an environmental tool.

Tebello Tlali and Lynette Jacobs have examined the quality of teaching in one South African university, where overcrowding, a deficit of equipment and a lack of lecturer training is resulting in teaching that does not inspire and motivate learners. They conclude that much more needs to be done to enhance the use of a more constructivist approach in university teaching so as to enhance student learning and improve assessment practice.

Gillian Hilton and Helen Tyler, examine a new policy and approach to the training of teachers in England, where school-led training has been introduced, lessening the involvement of universities. The causes for and the effects of this policy are examined showing danger of departmental closures, a lack of research input in teacher training and a possible recruitment crisis. Their second paper presents findings from research with trainees, mentors and tutors involved in training and assessing students on this new programme questioning the efficacy of this approach and the problems its introduction has posed, including a decline in subject and educational theory studied in the programmes and concerns over the training of and responsibilities on mentors.

Part 4 presents a collection of 16 papers comprising research work on lifelong learning, social inclusion and higher education.

Ogunleye et al.'s and Plavšić and Diković's papers respectively examine students' and teachers' perceptions of a 'successful' lifelong learning training intervention within the context of the policy on European Lifelong Learning, and students' plans for teaching and lifelong learning. Similarly, Lalović and Gvozdenović's discourse on lifelong long learning demonstrate why 'aging memory' should never be a barrier to or a limiting factor for lifelong learning.

Canales Rodriguez and García Robelo's comparative study of tutorship and school academic trajectories in two Mexican public universities, Burçer's assessment of the implementation of the ERASMUS programme in Turkey, Gravite's examination of the interactions between higher education and labour market, Dimitrijević's school teachers' perceptions of cultural differences, Borovac's voices of children in education research, and Gag and Schroeder's discourse on vocational and technical education all reflect the diversity of curriculum in higher education.

The third strand of Part 4 focuses on aspects of social inclusion – and it forms a significant proportion of the papers published in Part 4. Papers on social inclusion by Anczewski and Anczewska, Chrostek et al. and Nowak respectively examine how unemployment might pose a barrier to the social inclusion of mental health service users, how education might be used to combat the stigma of mental illness and how the role of training in mental health recovery is transformational.

Similarly, papers by Canen and Ivenicki, Stankovska et al., Stockton and McNeeley, and Romstein respectively explore topics as diverse as multiculturalism within the context of Brazil, the education of children with special educational needs, quality, social justice and accountability in a simulated educational context, and inclusive education – all of which explain the importance of the social inclusion sub theme of Part 4.

Part 5 devoted to law and education, has 4 papers which focus on different aspects of legislation, inclusive education, child protection, and human rights education. Two papers by Elizabeth Achinewhu-Nworgu et al. discuss the implications of UK immigration rules for non-EU students, and specifically some experiences of students from Nigeria, and doctoral students' understanding of legal and ethical obligations in conducting education research. Shade Babalola's study examines challenges faced by Eastern European students within a 16-19 education setting in the UK. Steve Greenfield presents and discusses a very interesting case on safeguarding children from sporting mismatches.

Part 6 on research education includes 5 papers. Individually and collectively, the papers represent important contributions to the field of research education and research practice. Consistent with the focus and scope of the Bulgarian Comparative Education Society, the papers prompt interdisciplinary dialogue and promote learning across borders.

The collection opens with the paper entitled "Developing research capacity through professional training". Lynette Jacobs reports on a planned, professional, postgraduate diploma that aims to develop professionally educators and education officials towards policy making. The purpose of the discussed program is to prepare students for advanced leadership positions in the field of Education Policy and Law. The author argues the importance of providing students with necessary knowledge and skills to undertake research which will effectively address challenges within the South African context.

The importance of competent South African researchers able to solve national education challenges and to participate meaningfully in international interdisciplinary research is further explored within the paper entitled "Developing educationists as globally competent education law researchers for international interdisciplinary research: A South African perspective". Johan Beckmann and Justus Prinsloo argue that there is a need to develop globally competent educationist education law researchers. Within the paper, the authors explore the hybrid field, internationally known as Education Law discipline. The authors make a point that although Education Law is recognized as an academic discipline and as a separate field, in many countries it is not taught and researched in higher education institutions.

The subsequent paper "Martini qualitative research: Shaken, not stirred" continues the exploration of researchers' knowledge and skills to conduct quality research. FJ Nieuwenhuis brings attention to typical difficulties that particularly novice researchers may encounter when they 'blend' or 'stir' qualitative research methodologies and methods. As the author clarifies, the notion of 'blended' qualitative research is conceptually shaken in terms of its paradigmatic roots, methodological approaches and data analysis considerations. In the conclusion, the author reminds novice and experienced researchers that although there is a diversity of approaches, methodologies and methods in qualitative research "you *cannot blend methods and methodologies that do not blend*".

The next paper "Understanding the nature of structures in education: Recent developments" written by Johannes L van der Walt documents how 21st century education researchers could, if not, should approach the scientific description of diverse elements (e.g., curriculum, support and management structures) within educational system that they might encounter. The author argues that although it is relatively easy to describe these different elements and show how they interconnect to form an education system as a total structure, such description could be perceived as simplistic and reductionistic thus scientifically indefensible. The paper is a thoughtful and informative exploration of three different approaches to research as well as theories and methods that could be considered for implementation in a post-postfoundationalist approach.

The final paper entitled "Enriching higher education training through values and social engagement" describes how development of a knowledge economy impacts universities, which are increasingly faced with demands to produce and commercialize ideas. Gustavo Gregorutti brings attention to the excessive emphasis on faculty research productivity in detriment of ethic and values training that is key for a successful professional development and an effective implementation of any project. The author urges universities to add an ethical and moral dimension when training students to become professionals and researchers.

Despite the valued contributions of these five papers, there is still much to understand about education of globally competent researchers for international and interdisciplinary research.

All papers in the book provide their own significant contributions to defining problems, clarifying concepts, discussing phenomena, and examining different approaches to the challenging topics the Conference focuses on.

The Editors

Prof. Dr.habil. Nikolay Popov (Sofia University, Bulgaria)

Prof. Dr. Charl Wolhuter (North-West University, South Africa)

Assoc. Prof. Dr. Klara Skubic Ermenc (Ljubljana University, Slovenia)

Dr. Gillian Hilton (Middlesex University London, United Kingdom)

Dr. James Ogunleye (University of Greenwich, United Kingdom)

Dr. Ewelina Niemczyk (Brock University, Canada)

May 2015

Introduction

JP ROSSOUW

QUALITY, SOCIAL JUSTICE AND ACCOUNTABILITY – CRUCIAL DETERMINANTS OF EXCELLENCE IN EDUCATION

Abstract

Internationally, the quality of education, social justice and accountability can be regarded as key elements of successful school systems and societies. Separately or jointly, these elements can be analysed and debated as distinct fields of study, and linked to an education system to determine the success thereof.

Being a pivotal element of education, much has been said about quality education. The exact nature and definition still seem to evade many scholars and practitioners, though. Governments worldwide may be content that its young citizens' right to education has been fulfilled by merely making it available, accessible, acceptable and adaptable. Many countries reach such a basic benchmark, but without the expected high quality education, real progress will not follow.

Social justice can be regarded as one central ideal and vision for an education system, a concept that includes both juridical and social elements. Similar to quality, scholars admit that the real nature, social intent and exact action associated with social justice is difficult to capture. Societies define social justice differently, and in some contexts it often also includes political undertones. What can be stated, is that social justice discourses are mostly prevalent in societies marred by inequality and injustice. The vision of social justice offers hope for a better future.

The level of accountability amongst public officials, school managers, teachers and students, in turn, is another indicator of the success of an education system. Closely linked to the notion of moral blameworthiness, accountability is a social obligation, based on the boni mores of the specific community. While legal systems are largely built on accountability, the standard eventually reached in an education system depends inter alia on their understanding of the level of accountability demonstrated by its role-players. Regulations guide the functions and responsibilities of stakeholders associated with a specific activity. Once promulgated, such a law establishes accountability and legal liability.

The central claim of this paper is that a categorically successful education system succeeds in providing an education of a quality higher than mere accessibility, in which social justice is achieved for the students, teachers and the society. These ideals can only be accomplished if a high level of accountability, as is expected by those stakeholders who expect an individual, department or institution to give account of own actions, prevails amongst all role-players.

Introduction

In a search for key requirements for successful school systems and societies, three concepts emerged: quality of education, social justice and accountability.

While a longer list could have been compiled, this paper claims that these elements can be regarded as crucial for success. This paper offers an analysis of these three as distinct fields of study, and are finally brought to fusion as joint indicators for an effective education system.

An international literature overview shows that various scholars link two of the concepts in their research, and discuss the influence of the one on the other. Social justice is, for example, often described in terms of quality education, while accountability is regarded in some literature as a crucial element in the quest for real social justice. In order to eventually reach certain conclusions in this paper regarding their interplay, it is necessary to first find clarity on the particular nature of these concepts.

Conceptual framework

The three identified concepts that jointly serve as determinants for excellence in education, will next be analysed as they manifest in educational contexts internationally. The South African context receives prominent attention in this conceptual framework due to the author's citizenship and research focus.

Quality

Quite rightly regarded as a pivot element of education, much has been said and written about quality education. Various scholars admit that quality is hard to define, a "slippery concept" (Van Kemenade, Pupius & Hardjono, 2008, p. 176) but it can be stated that you recognise it when you see it. In an attempt to explain the nature of quality in education, Johnson (2005, p. 5) argues that "*no matter what standards the public schools achieve, their quality depends on how much the community values their product*". He stresses the fact that the norm to determine quality in education is what people value, and the quality is often defined by those outside the system, not by the school management. Adding politicians to this arena, Tikly and Barrett (2011, p. 6) claim: "*Education quality is a political issue and as such participation in deciding about what are the valued outcomes of education and valued processes to support these should be a matter of debate*". It thus can be stated with some certainty that the quality of any entity is rather determined by external observers than by internal role-players.

Quality is judged from different angles. Van Kemenade, Pupius and Hardjono (2008, p. 176) quote Garvin (1984) who discerned five approaches to quality: the transcendental approach; the product-oriented approach; the customer-oriented approach; the manufacturing-oriented approach; and the value-for-money approach. These approaches are not very useful in an attempt to define quality education, since terms such as "product", "customer" and "manufacturing" are not, and should not be integral to education in the pure commercial sense. Firstly, if one has to apply them to education, and dissociate the concept from the commercial connotation, "product" may reflect the extent to which students are deemed to be educated when they leave school, and they are thus referred to as "products" of the school. In such an approach the level of education, as observable in the students, is seen as the norm to determine the quality of the school and the education it provides.

Secondly, in a customer-oriented approach the opinions and perceptions of the students and parents may be the central indicator, consistent with Johnson's

approach, as discussed. The school offers quality education if these stakeholders experience satisfaction. Meier (in Hughes, 2013, pp. 21-22) also agrees that a good school is one where the students are not treated as mere "numbers" or "future members of society". They should experience the school as a positive environment and an extension of a good childhood.

Thirdly, the "manufacturing" approach is followed when the school is judged by the success and effectiveness of its processes, as observed by a variety of stakeholders. In the South African context, these processes may be the achievements of the sport teams, the students' academic achievements in the final year, and accomplishments on cultural level such as drama or participation in a choir. In many communities in South Africa activities such as sport and culture are only provided by schools. These are then often used as marketing tools to attract the best students out of the community.

Studying South African schools, Hayward (2006, p. 2) offers five pillars that, if applied in a classroom or school, can ensure quality education. These are:

- Values, as expressed by both the SA Constitution and a specific school's value system, vision and mission.
- Leadership opportunities given to the full spectrum of stakeholders, including the learners, teachers, School Governing Body, School Management Team and parents.
- A school improvement plan that aims at the enhancement of personal growth, academic results and the co-curricular program.
- The effective communication of strategies with all relevant stakeholders inside and outside the school.
- Improved tools and techniques regarding assessment and evaluation.

Hayward (2006, p. 32) points at the fact that, to ensure a school of quality, these five pillars should "be working together". He also claims that the success of such model is not primarily dependent on the availability of finances, but rather the commitment of those involved. Rossouw and Niemczyk (2013, p. 3) maintain that such mutual commitment and considerate collaboration is mainly based on the ethical behaviour of those involved in the pursuit of delivering quality work. What can be added as a further factor that impacts on quality, is the context of the school, especially the specific community.

Fellow South African scholars Soudien, Motala and Fataar (2012, p. 4) state that a substantial amount of thought should go into the establishment and maintenance of quality and the experience of it. In this regard, individuals' relationships with others are also important. They add that:

… while quality is not a fixed thing but is a value which is in constant formation, what makes this value significant is that it has to be substantiated rather than simply asserted. It requires consistent thinking over. Working out what it is is hard and has been the subject of substantial discussion and debate for decades. Individuals, families, schools and systems of education constantly grapple with an understanding and definition of quality that is rigorous.

To conclude this concise conceptualisation, it is clear that quality, while admittedly difficult to define, is often determined by those outside of a specific institution, provided that they make objective observations. Their (sometimes biased) perceptions of what is good and what not, are the determining factors. In

determining excellence in schools, such an approach is often not ideal, seeing that outsiders are not always informed about widely accepted benchmarks against which the academic performance of schools are measured. In the South African context they tend to judge the quality of a school by more obvious and visible factors such as the pass rate in the final year of school, sport achievements, the appearance of the facilities and the rest of the premise, or the way in which they or their children are welcomed on arrival.

Social justice

What is true of attempts to define the concept quality, can also be said about social justice. In her South African oriented study Van Deventer (2013, p. 5) points out that both in South Africa and internationally different emphases are placed on different concepts associated with social justice. She explains:

> *Scholars of social justice are, however, still struggling to find an encompassing definition for the concept. The literature study has revealed that it is primarily a social concept, essentially difficult to capture, and politically burdened with numerous interpretations (Shoho et al., 2005, p. 48) and differing accents (Marshall & Oliva, 2010, pp. 5-6).*

Tikly and Barrett (2011) focus in their research on the quality of education from a social justice perspective. They criticise the scope and applicability of two other perspectives that, at the time of their publication, dominated thinking on education quality, respectively the human capital and human rights based approaches. Tikly and Barrett (2011, p. 3) postulate that a human capital approach to quality in education mainly focuses on economic growth as an indicator, while the human rights approach emphasises the role of the state in guaranteeing basic rights. In the latter case the statement might be an oversimplification of the wide variety of ways in which a human rights approach is factored into quality education. These authors then recommend the social justice approach as a better vehicle for discourses on education quality, seeing that it "can provide a fuller rationale for a policy focus on education quality".

In South Africa, Turnbull (2014, p. 102) relates the necessity of social justice to the apartheid history:

> *Following the democratic elections of 1994, the importance of promoting social justice in South Africa post-apartheid was established in the Constitution (1996). The role of education in delivering the Constitution's intentions was set out in the White Paper on Education (Department of Education, 1995), and in subsequent White Papers and policy documents.*

Of note here, is Turnbull's statement that the education system plays a very specific role in the establishment of social justice, at least insofar as it relates to the ideals of the South African Constitution, as promulgated 21 years ago. The preamble of the Constitution (SA, 1996) envisages the following ideals for the constitutional dispensation:

> *… the Constitution, as the supreme law of the Republic so as to*
> - *Heal the divisions of the past and establish a society based on democratic values, social justice and fundamental human rights;*
> - *Lay the foundations for a democratic and open society in which government is based on the will of the people and every citizen is equally protected by law;*

- *Improve the quality of life of all citizens and free the potential of each person; and*
- *Build a united and democratic South Africa able to take its rightful place as a sovereign state in the family of nations.*

Over and above the specific reference to social justice, most of the other concepts included in the preamble also directly or indirectly relate to justice in society. The preamble thus offers a fitting introduction to and sets the tone for a Constitution wherein several values are enshrined in section 1:

Republic of South Africa

The Republic of South Africa is one, sovereign, democratic state founded on the following values:

a. *Human dignity, the achievement of equality and the advancement of human rights and freedoms.*
b. *Non-racialism and non-sexism.*
c. *Supremacy of the constitution and the rule of law.*
d. *Universal adult suffrage, a national common voters roll, regular elections and a multi-party system of democratic government, to ensure account-ability, responsiveness and openness.*

Of specific relevance in this discussion that aims at defining the concept of social justice are the founding values of human dignity, equality, and freedom. Over the past two decades these three values, together with the right to life, have become household terminology in South Africa, and are also echoed in many mission and vision statements of educational institutions, including public schools and universities. The education system at large, and more notably the schools, play a crucial role in the nation's quest for social justice. As with various other human rights related ideals, the challenge is to (internally) implement the principle of social justice during the education process, and simultaneously (externally) instil it in the wider society. Put in a different way, schools have a double obligation: make social justice and other aspects of human rights a reality for the students during educational activities, and also carry the principles out into the community. Carr and Hartnett (1996, p. 9) confirm another perspective on the important role of schools in the interaction between school and community by stating: "*Any political system shapes education and conversely education unquestionably determines the type of political system that a society will have*".

It can thus be stated that achieving social justice is a process whereby internationally accepted values or those values enshrined in a constitution, bill of rights, some convention or mission statement, is firstly internalised by the associated individuals. This can be done by becoming aware of values as legal imperatives in a bill of human rights, a moral blameworthiness (if not demonstrated), or just a basic ethical approach to life. Secondly: once internalised, these values are lived, demonstrated, and consciously or unconsciously transferred to others. In education at school, the inspirational teacher thus instil these values in students, who, in turn internalise such values and "live them out" towards others. Such a process gives rise to social justice in that society.

Accountability

In education, and beyond the education sphere, accountability is closely linked to the concept of quality: in the absence of the former, the latter is hard to reach. It is

also hard to imagine that social justice will prevail in a society characterised by a lack of accountability.

Bovens (2007, p. 450) briefly defines accountability as "the obligation to explain and justify conduct", but also offers a more comprehensive definition:

Accountability is a relationship between an actor and a forum, in which the actor has an obligation to explain and to justify his or her conduct, the forum can pose questions and pass judgement, and the actor may face consequences.

Discussing the possibility of accurately defining accountability, Küsters, Truderung and Vogt (2010, p. 526), state that:

… there does not exist a general and convincing definition of accountability that would allow to assess the level of accountability a protocol provides. The few existing formulations of accountability are, for the most part, quite ad hoc and protocol specific.

Nieuwenhuis et al. (2007, p. 103) concur with this element of contextuality by stating that meanings ascribed to accountability depend "on 'who' defines it and for 'what' purposes they define it". In her research on accountability owed by Higher Education lecturers, Bothma (2015, p. 129), claims that a clear, generally acceptable definition for accountability does not exist. Similar to both quality and social justice, as discussed, Bothma (2015, p. 129) states that it is:

… a very elusive concept lacking clear scope and boundaries. Contemporary scholarly discourses use accountability as a conceptual umbrella covering everything from transparency and democracy to efficiency, responsiveness and responsibility.

The level of accountability amongst public officials, school managers, teachers and students is an indicator of the success and quality of an education system. Closely linked to the notion of moral blameworthiness, accountability is a social obligation, based on the *boni mores* of the specific community. The standard eventually reached in an education system depends *inter alia* on the level of accountability demonstrated by its role-players. Legal imperatives regulate and guide the functions and responsibilities of stakeholders associated with a specific activity, and, once promulgated as law, such determinants establish accountability or legal liability.

In addition to its general definition, the concept accountability therefore has a legal basis. Accountability as a central value has found its place in the supreme law of South Africa, the Constitution, where in section 1(d), it refers to accountability, responsiveness and openness. Accountability and the other founding values should also be read with the notion and ideal of a *democratic and open society,* as stated in the preamble and reiterated in sections 36 and 39 of the Bill of Rights, which forms chapter 2 of the Constitution.

A key difference between the legal terms accountability and liability, according to Nissenbaum (s.a., p. 1), is the grounds on which each is considered: liability is assessed on the damage experienced by the plaintiff or victim, while accountability is "on the relationship of an agent to an outcome". Another difference is that accountability is closely linked to the notion of moral blameworthiness referring to those cases where harm done is brought about by a wrongful and negligent action on the side of the agent. Accountability, which is linked to moral blameworthiness, is a

social obligation, based on the *boni mores* of the specific community, while liability is linked to legal measures.

Legal systems are largely built on accountability, seeing that most legal provisions regulate the respective functions, responsibilities, rights and duties of stakeholders associated with a specific activity. Accountability is also the basic premise of delictual liability in cases of damage caused by wrongful and negligent or intentional acts. Accountability is obviously not only a term used by jurists, but it is used and understood much wider as an imperative for a society characterised by order and justice.

In the light of above, accountability refers to a social obligation that has already been established in 2027 (BC). Van Wyk and Chege (2005, p. 26) point to the fact that the Laws of Hammurabi was developed 20 centuries BC to ensure justice in society, to counteract evil and to restrain the powerful from oppression of the vulnerable. It also does not only have such vertical application between a powerful entity such as the state and the weak, such as minority groups or individual citizens. Being held accountable for one's actions is equally applicable on horizontal level, in the relationships between individual citizens. This has been the case since the establishment of civilisation. The Laws of Hammurabi contained the following legal rules:

> *If a builder has built a house for a man and has not made his work sound, and the house which he has built has fallen down and so caused the death of the householder, that builder shall be put to death.*
> *If it destroys property, he shall replace anything that it has destroyed; and, because he has not made sound the house which he has built and it has fallen down, he shall rebuild the house which has fallen down from his own property.*
> *If a builder has built a house for a man and does not make his work perfect and a wall bulges, that builder shall put that wall into sound condition at his own cost.*
> *—Laws of Hammurabi [229, 232, 233], circa 2027 B.C.*

Despite strict legal regulation, the phenomenon of not to accept accountability is noticeable in the political world, amongst government officials, and in school communities. It is also part of the relationship between schools and parents, often when the progress of children's education is assessed. Educators blame parents, and vice versa, for the lack of the expected progress. The unwillingness to accept responsibility is arguably one of the most prominent reasons for the absence of quality education in the estimated 75% of South African schools that are currently classified as only partially functional or dysfunctional.

To blame another party for what has gone wrong, or to shift the responsibility for something that still has to be done to another person, is a natural but unacceptable tendency. Looking at education matters in a critical way, as is expected from an academic, will always include an element of blame. This does not, however, exempt any scholar from actively and creatively seeking solutions. It might be that many scholars feel, or might even be convinced that they can personally make no contribution towards the state of affairs in public education. We should accept that there is a certain level of accountability amongst scholars.

Of major concern is the approach of a large segment of teachers regarding their educational and professional duty. If education as a profession is judged, one can

empirically establish the wide range of attitudes towards teaching. Well-functioning South African schools, and even some mediocre schools, have educators in their staff who compare favourably with the best in the world. The adverse influence of members of the dominant teachers' union is, however, clear. Many of these teachers demonstrate an attitude to their duties that is contrary to the international notion of professional conduct. The notorious dysfunctionality of numerous departmental offices, often also due to the influence above-mentioned union, is also apparent. Needless to say, an unfortunate combination exists when educators are not motivated and refuse to be held accountable, the national Department of Basic Education is not functioning well because officials shy away from accountability, and the political will to effectively uplift education is seemingly not strong enough, despite many commendable initiatives from government.

Although above discussion of accountability only scratches the surface of such a complex and vast concept, it should be clear that accountability stands central to the success and quality of any educational endeavour. Alongside equality and social justice, it can rightly be called a crucial indicator for excellence in education.

Fusion of concepts

After an analysis of the most salient characteristics of the three concepts, I am now finally in a position to generate a synthesis of the interplay between the three in selected educational contexts. As stated in the central claim of the paper, these concepts separately (as discussed in the conceptual framework) or jointly, can serve as crucial determinants of excellence in education. If any one of quality, social justice or accountability are regarded as ideals for an education system, they can also serve as indicators of prevailing excellence.

To fuse these concepts is not difficult. Existing links between two of the concepts, and how they influence each other, have been confirmed in the literature analysis of the conceptual framework. Tikly and Barrett (2011, p. 3), for example, postulate that quality education is directly linked to and dependent upon social justice. Also confirming an existing link, it has been established that the level of accountability amongst role-players in education is an indicator of the quality of an education system. Again, quality depends on another factor, in this case account-ability.

Based on such cause-effect reasoning, I want to conclude the paper through the formulation of three extended statements, in which I fuse all three concepts in an attempt to establish the triangular interplay that emerged. Firstly, once accountability and social justice have become established characteristics of an education system on national, local, school or class level, it will lead to education of a higher quality. There are obviously a myriad of other factors that play a role in the establishment of quality education, but the relative absence of accountability and social justice will decay any system to such an extent that real quality education will be rendered non-existent. If a teacher does not experience justice in the social context of the school community, it will inevitably lead to a decline in motivation, effectively diminishing quality teaching. If a teachers' union fails to establish and maintain accountability as an organisation or amongst its members, the education system has a slim chance of witnessing quality education provision in those schools where the majority are members of such union.

Secondly, prevailing and sustained accountability and quality education jointly will contribute to social justice amongst students and teachers. If teachers approach their educational task with integrity and visible accountability, and simultaneously uphold the students' right to education of a high quality, such students have a good chance of experiencing social justice. Students will witness that certain values have been internalised by the teachers, and that they acknowledge students' human rights. Education of such a nature has an excellent chance of establishing and internalising the same values in the individual student, who will in turn live it out in his or her interactions with others.

Thirdly, a link can be established between quality education and social justice on the one side, and a resulting higher level of accountability. Teachers who actively aim at offering and maintaining quality education, and simultaneously strive towards social justice by standing for certain values in their relationships, are also those teachers who embody accountability in its ideal form. The negative of such argument is equally true: an absence of quality education provision and a lack of acknowledgement of social justice principles, denying others' their human rights, are invariably associated with a lack of accountability.

In conclusion, it can be inferred that a categorically successful education system succeeds in providing an education of a quality higher than mere accessibility, one in which social justice is experienced by the students, teachers and the school community. It can ultimately be stated that accountability prevails over the other two concepts: any ideal regarding social justice or quality education can only be accomplished once a high level of accountability, as is expected by those stakeholders who expect an individual, department or institution to give account of own actions, is established amongst all role-players.

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Part 1

Comparative Education & History of Education

CHARL WOLHUTER, KONSTANTINOS KARRAS & PELLA
CALOGIANNAKIS

THE CRISIS IN WORLD EDUCATION AND COMPARATIVE EDUCATION

Abstract

The radically and rapidly changing societal context has placed education at the crossroads, necessitating a re-thinking of education. At the same time, urgent challenges confront humanity, such as the environmental crisis and the creation of social capital (to keep together an increasing diverse society) — to mention but two. In all these education is a key variable, and — rightly so — the vehicle selected by humanity to meet the new future. This paper surveys these global societal contextual factors in the twenty-first century, and the implications thereof for education. Comparative and International Education is put forward as the best available means to deal with the challenge of creating a system of education geared for the imperatives of the new age.

Introduction

We are living in exciting times, of mind-boggling changes. Ever increasing levels of economic affluence, the information and communications technology (ICT) revolution surging ahead, and constantly entering terrain unimaginable a few years ago, increasingly diverse and complex societies, and more and more opportunities for individuals to exert individual choices, open up new vistas all the time. At the same time urgent challenges confront humanity, such as the environmental crisis and the creation of social capital (to keep together an increasing diverse society) — to mention but two. In all these education is a key variable, and — rightly so — the vehicle selected by humanity to meet the new future. The changing societal context has placed education at the crossroads, a re-thinking of education is necessary all the time. The aim of this paper is to take stock of the societal changes characterizing the early twenty-first century, to hold up the current state of education worldwide against this mirror of societal trends; and to determine the implications of all these for Comparative Education. This paper is based on a recently published book which was edited by the three authors on a book which was recently published, and which deals with the international education crisis: Calogiannakis, P., Karras, K., Wolhuter, C. C., Chiang, T-H., Tendo, M. (Eds.) (2014): *Crisis in Education: Modern Trends and Issues.* Athens: HM Studies and Publishing.

The changing societal context impacting on education

Twenty-first century society is characterised by dramatic changes, all impacting on education. In all aspects of society: geography, demography, technological development, economic system, social system, political system and religious and world-view, radical changes are taking place.

Geography: The environmental crisis

Geographically, the most urgent problem requiring attention is the ecological crisis. Increasing population numbers and rising affluence place the environment under more and more pressure. The main facets of the environmental or ecological crisis are air pollution, global warming, pollution and depletion of fresh water resources, soil erosion, deforestation, pollution of the oceans and depletion of marine life, destruction of bio-diversity and the disruption of the ecological balance brought about by relocation of species (of plants and animals) by human action (whether deliberately or by accident).

Demography: *Population explosion, an aging population and a mobile population*

Friedman (2008) makes a case that the three biggest challenges facing humankind are the population explosion, the environmental crisis, and the information and communications revolution. The global population has recently (October 2011) passed the 7 billion mark. While the growth rate is decelerating, e.g. it went down from 1.2 percent per year during the decade 2000-2010, to an estimated 1.0 percent per year for the decade 2010-2020 (World Bank, 2012: 44), 84 million people are still added to the global population every year. The global average masks large differentials in the growth rate: from 0.1 percent per year in the Euro area, to 2.4 percent per year in Sub-Saharan Africa.

Worldwide the average age of people is rising. Finally people today are more mobile than ever before, as can be seen in for example increasing number of immigrants in most countries making most countries more multicultural in population composition.

Technology: *ICT Revolution*

The expanding frontiers of science and the exponential increase in technological innovations will significantly affect the future. One very salient facet of technological progress is the information and technological (ICT) revolution. An instantaneous, easily accessible 24-hour global network is taking shape. Practically every office and many households have a computer. A large proportion of jobs and work now entails information processing. Instead of standardised mass production, computer driven customisation (catering for individual tastes) takes place.

Economy: *Increasing affluence, economic liberalisation, economic internationalisation, the rise of a knowledge economy*

In 1990 one of the most forceful and sustained economic upturns in history commenced. The global economic output rose from US$ 29.6 trillion in 1995 to US$ 60.5 trillion in 2008 to US$ 69.9 trillion in 2011. Simultaneously a global process played itself out, and although it began in the West, it has spread to the East and to the Global South. The role of the state in the economy is being reduced, and market forces are given the right of way. A third change is that the world economy is steadily becoming more integrated. A final trend is the rise of a knowledge

economy, that is where the production and consumption of new knowledge becomes the driving axis of the economy.

Social trends: Decline in prominence of primary and secondary social groupings, rise in importance of tertiary social groupings, emergence of multiculturalism

The pervasiveness of the primary social grouping in society, the nuclear family, has been declining. Ditto for the secondary social grouping, namely the work place. On the other hand tertiary social groupings (i.e. functional interest groups) are becoming more prominent, i.e. because of the emancipation and empowerment of such groupings by the information society. The steady stream of immigrants from the Global South into the countries of the Global North and the erosion of the power of the nation-state (discussed below) all contribute to the replacement of the long standing idea of one officially sanctioned culture within the borders of the state, and the rise of multiculturalism — giving positive recognition to the existence of cultural diversity within the borders of the state (*cf.* Magsino, 1995).

Political trends: The demise of the nation-state; democratisation

The information and communications revolution, the globalisation of the economy, and the downsizing of the state out of economic necessity all have contributed to the tearing down of the power of the state. In the vacuum left, the locus of power has shifted in two opposite directions: upwards towards supranational and international structures, and downwards towards sub-national and local structures, eventually right down to the individual. Concomitant to these changes, a worldwide process of democratisation gathered force the past quarter of a century.

Religious and life- and world view trends: The persistent but new and more complex presence of religion and the values revolution

Despite frequently made claims that the modern age is a post-religious secular age, religion persists as an important factor in individual lives, as large scale surveys in societies all around the world show. In an age of individualism people no longer always neatly fit into neat categories such as "Christian" or "Shik Muslim" but an infinitely more rich and complex tapestry of individualized religious convictions are taking shape. The increasing individualism, is sparking a diversity of value systems that are replacing the traditional, homogeneous societies that were previously characterised by specific, uniform value systems.

Implications for education: need for a total rethink of education

The above set of societal changes imply that a radical rethink of education, as it is today, is urgently needed. The present array of (national) education systems has acquired their quintessential features as a result of a process of evolution in response to a context of a different clutch of societal trends, which means they have become quite outdated. Each of the above enumerated societal changes asks for a corresponding change in education. Every aspect of education requires a rethink, be it the objectives of education, systems of administration and management, curricula, institutional fabric, the student corps, the teacher corps, ways of teacher education, methods, assessment, language of learning and teaching, physical infrastructure, or support services. For example, the objectives of (national) education systems — it is so that national education systems came into being from the nineteenth century in

order to socialise the youth into loyalty to the nation-state (which became a force on the world scene since the nineteenth century (*cf.* Cohen, 1970; Welch, 1991). The demise of the omnipotent nation-state means that membership of other smaller and larger political units should figure more prominently in the formulation of objectives of education systems. The trend of individualisation and the rise of a knowledge economy imply that conformity as educational objective should make way for individualisation to be values and for the nurturing of creativity.

The ageing population profile, combined with the knowledge revolution mean that education should no longer be conceived of as a once-off event, squashed in a few years during childhood and adolescence, but should be conceptualised as a lifelong process, adult education and lifelong learning should be given more attention. The religious trends identified above mean it makes sense to no longer use public schools to foist down the official state-sanctioned religion into the throats (or minds or hearts) of children — as the modern trend in education worldwide is; but the persistence of religion as a force in the lives of the majority of people in the world also make the contemporary trend of forced, uniform or religious-neutral public schools problematic (*cf.* Van der Walt *et al.*, 2010). The information and communications technology revolution opens new possibilities for education and make the desk, script and chalkboard centred education appear as an anachronism.

The role of Comparative Education

As they grapple with the assignment of re-inventing education, policy makers and education practitioners worldwide do not have a ready made, completed model available. They are embarking on a road which has not yet been travelled. They are moving slowly, inch by inch forward.

As a very simple and concrete example, growth in enrolments and in gross enrolment ratios can be taken. Imperatives such as an increasingly advanced and complicated (technologically and otherwise) world, the knowledge economy and the Creed of Human Rights (stipulating the right to education as a fundamental human right) mean that education should be made available to everyone, at least basic (that is primary and lower secondary school education). Since 1950 primary school enrolments worldwide have grown as follows (figures in thousands): 1950: 177 415; 1960: 243 487; 1970: 411 304; 1980: 541 566; 1990: 596 863; 2000: 654 722; 2010: 695 207. The aggregate global gross primary enrolment ratio has also surged impressively: 1950: 59%; 1960: 62%; 1970: 89%; 1980: 96%; 1990: 99%; 2000: 99%; 2010: 107% (over 100% due to large numbers of overage children in primary schools). Yet in 2011, there were still 57 million children of primary school age in the world who were not at school (UNESCO, 2013). And if this very basic level of primary school education has not yet been brought to everyone, even larger percentages of the world population do not attend secondary and higher education. In 2010 the global aggregate gross secondary education enrolment ratio stood at 70% while the global aggregate gross higher education enrolment ratio was 30%. Even the very, very basic goal of universal adult literacy has not yet been achieved. From 2000 to 2010 the global adult literacy rate crept forward from 87.32% to 89.44%, while the number of illiterate adults worldwide were but marginally reduced, from 787 252 516 in 2000 to 781 386 451, i.e. almost a billion adults in the world are still illiterate (UNESCO, 2015).

In pursuing the drive for the expansion and the improvement of education, in the absence of an already tested model, the only means available to educational policy makers and education practitioners is Comparative Education.

Comparative Education can be defined as having a "three in one" perspective on education (Wolhuter, 2014):

- an education system perspective;
- a contextual perspective;
- a comparative perspective.

The particular instance of education, of an adult/education educating/teaching a child/education and – being of interest to other scholarly fields of Education, such as Educational Psychology – normally lies beyond the resolution power of Comparative Education. Comparative Education focuses on the education *system.*

The focus of Comparative Education is broader than must the education system *per se.* The education system is studied within its societal context, and is regarded as being shaped by, or as being the outcome of societal forces (geographic, demographic, social, economic, cultural, political, and religious). The impact of these societal forces on education, as well as the effect of education on these societal systems, are subjects of study of Comparative Education (Calogiannakis & Kazamias, 2009; Karras & Wolhuter, 2015).

Finally, Comparative Education does not contend with studying one education system in its societal context in isolation. Various education systems, shaped by their societal contexts, are compared; hence the comparative perspective.

The international-comparative method is an accepted and widely implemented method for the investigation of public policy questions, also in the field of education (Crossley & Watson, 2011: 103). The international-comparative method entails the comparison between education systems and institutions as they are found and function within the different (national) societal contexts (Manzon, 2011: 169). In this way, different countries can learn from one another's experience in the field of education (Kaur, 2010: 1). In Comparative Education, research has to take into account the contextual factors (i.e. geographic, demographic, social, economic, political and philosophical) thoroughly (Schriewer, 2006: 312), otherwise the danger exists that attempts at deriving best education practices from foreign education systems get lost in contextual realities (De Wet & Wolhuter, 2007).

Conclusion

The current epoch is one of a new and rapidly changing society. This society has assigned to education an array of tasks as never before, and society seems to depend on education more and more. Yet the current education systems in the world is a relict of a past, having acquired its form in serving a set of contextual imperatives totally different from the present. This means a rethink and rebuilding of the education systems of the world is essential, and urgently needed at that. As the nations and people of the world strive to extend equal education, quality education and relevant education to all, they are venturing into unchartered waters, with no existing map. All they can draw on is each others' experience, as they grapple with contemporary challenges relation to the supply of education. In this exercise, the scholarly pursuit of Comparative and International Education acquires new and enhanced relevance.

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TEODORA GENOVA

TORSTEN HUSÉN – A CO-FOUNDER AND CHAIRMAN OF IEA FROM 1962 TO 1978

It is relatively easy to proof read life, but very difficult to predict it.
(an oft-repeated saying of Torsten Husén)

Abstract

This paper reviews the work and contribution of one of the most influential comparativists in education – Torsten Husén in the period when he was a co-founder and chairman of the International Association for the Evaluation of Educational Achievement (IEA) in the 60 and 70 decades of the 20th century. At that particular time, the first major cross-national and widely reported IEA surveys were carried out. The author places special emphasis on the exemplary First International Mathematics Study (FIMS), which "presents the results of the first completed survey of the achievements of thirteen-year-olds, pre-university mathematics and nonmathematics students in twelve countries" (Eckstein, 1977). As a result, the IEA initial studies revolutionized the reality of Comparative Education as a scientific field and an academic discipline in a way that it proved that such research was completely feasible.

Key words: achievement, Comparative Education, evaluation, feasibility, IEA, survey, Torsten Husén

Introduction

My interest in exploring the significance and contribution of Torsten Husén is derived from my overall interest in the Nordic, i.e. Scandinavian comparativists and their scientific achievements within the field of Comparative Education from the middle of the 20th century to the present day. Referring to the undoubtedly colossal presence of Husén in the educational context as a starting point and stressing on his founding membership and chairmanship of the International Association for the Evaluation of Educational Achievement (IEA) between 1962 and 1978 gives impetus to follow the process of development of the empirical science of Comparative Education through the performance of several cross-national surveys, which succeeded in determining the feasibility of research on educational achievements across countries. The First International Mathematics Study (FIMS), conducted and subsequently published in two volumes by Professor Torsten Husén himself in1967, is taken as the center of attention exemplifying the importance of this transformational moment. According to King (1967, p. 359) "these two volumes represent a break-through in comparative studies of education", concluding that "comparative studies have greatly extended their range of comparison, their efficacy, and their persuasiveness by this new pattern of co-operative enquiry" (p. 363).

Short Biography of Torsten Husén (1916-2009)

Considered by all means one of the most influential figures in Comparative Education according to the *Survey of Comparativists and Their Literature* (Cook, Hite & Epstein, 2004, Table 17) and regarded by his co-workers and some researchers in the sphere of education as "a cosmopolitan", "a chief architect of the educational reforms", "eminent in the world of education", "a polyhistor", "a great educator", an inspiring "doctorfather", and "an impressive personality in Comparative Education", Torsten Husén's reputation in Comparative Education and beyond it is entirely undisputed.

"The life's work of the Swedish educationalist Torsten Husén, which had lasted for more than 60 years, came to an end with his death on 2nd July 2009 at the age of 93. With his extensive basic research that opened up new perspectives, Husén undoubtedly became the best-known internationally of all Nordic scholars in the field of education. He was active as a source of far-reaching educational policy initiatives from the very beginning of his career and participated with cogent arguments in both domestic and international educational discussions" (Academia Scientiarum Fennica, 2009).

Limited by the scope of this paper, only a few of Husén's greatest merits are mentioned here. He was a Professor emeritus of Stockholm University, had honorary doctorates from universities in Europe and the United States. He was a member of the Royal Swedish Academy of Sciences, a foreign member of the United States National Academy of Education, Polish Academy of Sciences, and Finnish Academy of Sciences. He was also an honorary member of the American Academy of Arts and Sciences. He served on various UNESCO committees and was a consultant to the OECD. Throughout the 1960s and 1970s, ministries of education from various countries, along with the International Institute for Educational Planning (IIEP) and the UNESCO Institute for Education in Hamburg, increasingly asked Professor Husén to act as an expert consultant for different aspects of education. The OECD also asked him to participate in their reviews of educational policy. Husén was a chair of IEA between 1962 and 1978 and was appointed its honorary president in 1978. He was a co-editor-in-chief of the first and second editions of the *International Encyclopedia of Education* and a founding president of the International Academy of Education (IEA, 2011).

Brief History of IEA

IEA became a legal entity in 1967, but its origins date back to 1958 when a group of scholars, educational psychologists, sociologists, and psychometricians, among which Torsten Husén had a leading role, met at the UNESCO Institute for Education in Hamburg, Germany, to discuss problems of school and student evaluation, "which then was a rather new subject among educators, at least in Europe" (Husén, 1997). "The representatives of 12 educational research institutes from the same number of countries in 1961 decided to constitute themselves as the International Association for the Evaluation of Educational Achievement, later well-known under the acronym I.E.A." (Husén, 1997). "The basic idea of the founders of IEA was that the world could be conceived as a huge educational laboratory where different national practices could lend themselves to comparisons that would yield

new insights into the determinants of educational outcomes, serving as a basis for the improvement of the quality of education" (De Landsheere, 1997).

The first IEA studies in the 1960s and 1970s of the 20th century, which were conducted while Husén was the first chairman of the association, are as follows: The Pilot Twelve-Country Study (1959-1961); The First International Mathematics Study (FIMS) (1964); The Six-Subject Study (1970-1971). These subsequently led to the following studies in the 1980s: The Second International Mathematics Study (SIMS) (1980-1982); the Second International Science Study (SISS) (1983-1984), etc. In the 1990s, the first study in a four-year cycle of assessments in mathematics and science was launched under the name The Third International Mathematics and Science Study (TIMSS 1995), now known as the Trends in International Mathematics and Science Study. Regular data collections for TIMSS have taken place in 1999 (also known as TIMSS-Repeat), 2003, 2007, 2011 and currently the sixth cycle 2015. The first decade of the new century brought two meaningful developments to IEA studies: creating a base for new cycles (civic education, advanced mathematics and science), and entering new areas of assessment (computer and information literacy of students, teacher education). Another assessment series, the Progress in International Reading Literacy Study (PIRLS), has been conducted in five-year intervals in 2001, 2006, 2011 and the expected fourth cycle in 2016. PIRLS investigates changes over time in children's reading achievement at the fourth grade, regarded as an important transition point in their development as readers, and gathers information on reading education and children's early experiences at home and school in learning to read (IEA, 2011).

Presently, the unique role and network of IEA with almost 57 years of history, over 30 cross-national research studies, about 70 member countries and a secretariat in Amsterdam, the Netherlands, has contributed substantially to the development of a world-wide community of experts in educational evaluation. IEA studies are an important data source for those working to enhance student learning at the international, national, and local levels. By reporting on a wide range of topics and subject matters, IEA studies contribute to a deep understanding of educational processes within individual countries, and across a broad international context (IEA).

The period from 1962 to 1978: a Time of Ground-laying and Feasibility

In the introductory part of chapter V of *The Learning Society Revisited,* Husén (1986, p. 169) accounts for the short history of comparative studies in education with a strict empirical approach at the time when IEA was established. Neville Postlethwaite, the first executive director of IEA between 1962 to 1972, and a successor to the chairmanship of the association between 1978 and 1986, explains in depth the emerging necessity for conducting empirical studies at that time in *International Review on Education* (1969, p. 131): "The last two decades have seen an upsurge in many countries of educational surveys of an empirical research kind. In some cases it has been the policy makers who have recognised that it is necessary to have evidence as a basis from which to make decisions resulting in change in an educational system, e.g. Sweden and the United Kingdom where governments have commissioned specific surveys. In other cases it is the educational research workers (many of whom started in the discipline of psychology) who have initiated the

surveys and the policy makers are slowly learning the value of the evidence produced".

In the years preceding the designated period, i.e. 1956 through 1961, Husén happened to meet some 15-20 researchers regularly once or even twice a year in Hamburg. He points out that "at the beginning, the main topics were school failures, tests, examinations and evaluation – the latter a rather new concept at least on the European side of the Atlantic. Out of these meetings grew a rather new speciality in educational research, empirically oriented comparative education" (Husén, 1997). Torsten Husén was strongly supported by Professor Arthur Foshay of Teachers College, Columbia University, who in a research memorandum proposed a cross-national longitudinal study of "the intellectual development of school children" and Professor Arnold Anderson, who had just founded the Center for Comparative Education at the University of Chicago. Their mutual cooperation led to a pilot study which was aimed at exploring whether it was empirically possible to compare school achievements across countries. The pilot study was reported in 1961 and published the next year in *Educational Achievements of Thirteen-Year-Olds in Twelve Countries* (Foshay et al., 1962). The pilot study suggested a decisive and enormous step forward in developing an empirical science of comparative education. Husén explains further that "in a document sent out in 1962 it was stated: 'Since the end of the Second World War there has been an increasing realization that educational research and comparative education could be greatly strengthened if cross-national studies with a component of objective measurement could be carried out, thus bringing to bear the experience of educational research on international comparisons'" (Husén, 1997, p. 2).

On one hand, this first IEA project was notoriously successful, and on the other hand it also served as a starting point for further international surveys of the association. "The Pilot Study not only demonstrated the feasibility of a multinational educational survey, but also provided information which was useful in the generation of hypotheses for future IEA surveys" (Postlethwaite, 1974, p. 157). Husén and his team of researchers, who were inspired by the success of the first pilot survey, continued with a full-scale international survey of mathematics education conducted with representative national samples of students at the beginning and the end of secondary schooling in the same number of 12 countries, but two different. The First International Mathematics Study (FIMS) was carried out in 1964 and resulted in the publication of two volumes under the authorship and editorship of Husén – *International Study of Achievement in Mathematics: A Comparison of Twelve Countries* (Husén, 1967). Compared to the pilot study, the whole enterprise of FIMS was conducted in a much more scientific way in terms of instrument construction, sampling, etc. in Husén's own words. While the pilot study of 1962 was "concerned with many of the administrative and methodological problems entailed in such international collaborative work" (Eckstein, 1977) and the *feasibility* of cross-national comparisons, the mathematics study of 1967 presented the results of the first completed survey of the achievements of school pupils and was described "as a first step in an attempt to look at '*productivity*' in comparative education" (Fattu, 1967, p. 525).

Under the leadership of Husén during the period when he was a chairman of IEA a third international survey named The Six-Subject Survey was initiated in

1966 with a 3-year preparatory phase. It was described as a very ambitious cross-national study of achievements in reading, science, literature, civic education, English as a foreign language, and French as a foreign language comprising 20 countries this time. An enormous number of publications followed the survey including some of the most major ones: Bloom, B. S. (1969): *Cross-national study of educational attainment: Stage I of the I.E.A. investigation in six subject areas* (Vols. 1-2). Washington, DC: Office of Education (DHEW); Comber, L. C. & Keeves, J. P. (1973): *Science education in nineteen countries: An empirical study.* Stockholm: Almqvist & Wiksell; Passow, A. H., Noah, H. J., Eckstein, M. A. & Mallea, J. R. (1976): *The national case study: An empirical comparative study of twenty-one educational systems.* Stockholm: Almqvist & Wiksell; Peaker, G. F. (1975): *An empirical study of education in twenty-one countries: A technical report.* Stockholm: Almqvist & Wiksell; and Walker, D. A. (1976): *The IEA Six Subject Survey: An empirical study of education in twenty-one countries.* Stockholm: Almqvist & Wiksell. Eckstein (1977, p. 350) makes a distinction between the various publications: "In addition to the reports on each of the six subject studies, three volumes deal with the project as a whole: Peaker's report on the methodology (research design and analytical procedures), Walker's summary review of the project findings, and a comparative study of the relation between achievement levels and educational, social, economic, and other national characteristics by Passow and others".

The First International Mathematics Study (FIMS)

Among the above mentioned three cross-national surveys conducted by IEA under the auspices of Husén, the First International Mathematics Study (FIMS) is taken as an example to prove the true potential for implementing international surveys at a time when school systems were undergoing various major reforms in many countries across the globe. In this survey there were 5 450 schools involving 133,000 pupils across 12 countries (King, 1967). Husén (1973, p. 312) accounts for "four target populations at the 13 year and pre-university level were sampled and tested in all the countries, consisting of: (1) All the pupils who were 13:0-13:11 on the day of testing; (2) All the pupils at the grade level where the majority of pupils of age 13:0-13:11 were to be found; (3) All pre-university pupils studying mathematics as an integral part of their course for future training or as part of their pre-university studies; and (4) All the pre-university pupils studying mathematics as a compulsory part of their studies, and the remainder who did not take mathematics at all". The team of workers deliberately chose mathematics "as the subject least culturally involved" "to make their study most objective". "Mathematics is also peculiarly suitable for a survey of this kind because of its international intelligibility, and still more its obvious usefulness. Moreover, for quantitative surveys it is a particularly apt field of study" (King, 1967).

The implementation process of this survey was conducted by relating input factors, such as the social background of students, teacher competence, curriculum characteristics and teaching practices, to outcomes in terms of achievement and attitudes toward school learning, thus enabling the cross-national comparisons to be made on a much firmer basis. Then, Husén and his co-workers tried to identify factors which were decisive in influencing student achievement. In order to carry out

meaningful comparisons between countries and to identify such factors, they needed to establish internationally valid yardsticks by means of which the standards of pupils at certain grade or age levels or at certain terminal points (for instance at the end of the pre-university school) could be assessed.

Contrary to the supposition of critics who have argued that IEA in the early days failed to take account of differences in the selectivity of secondary schools in different countries, one of the prime motivations for conducting FIMS was to produce empirical evidence relative to the question of whether newly implemented comprehensive schools systems in various European countries were having a negative effect on educational achievement, when compared with more traditional and selective systems of secondary education. Issues specific to mathematics education were of secondary interest to the leaders of this first study. King (1967) explains that "they have shown how the empirical concepts and apparatus previously used in psychology and sociology can be taken into the schools to discover and test mathematical practices, attainment, and expectation internationally; they have pushed enquiries beyond the immediate environment of the schools into the ambitions, assumptions, and methods of teachers and other educational personnel; and to some degree they have been able to show a picture of educational fashions and practices undergoing change". The primary aim of this survey was to test a variety of hypotheses related to outcomes of different patterns of mathematics education set within various social and cultural contexts and to develop new strategies resulting in voluminous and complex data for Comparative Education. This IEA study repeatedly indicated that it was not designed to compare countries and it was not conceived of as an "international contest". Many of the hypotheses could not be tested unless cross-national differences were considered (Fattu, 1967). Husén (1973, p. 311) describes the objectives of the study in the following way: "The International Project for the Evaluation of Educational Achievements (IEA) was not launched primarily to compare countries. The cooperating research centers did by no means intend to conduct a kind of "cognitive Olympics". The overall aim was to relate certain social, economic and pedagogic characteristics of the different systems to the outcomes of instruction in terms of student achievement and attitudes. The IEA project was designed to study the relationships between education and the salient social and economic factors for each country".

This international survey of mathematics achievement is regarded by many researchers and critics at the time as "a significant and impressive work in comparative education. The distinguished group of researchers who conducted the study have assembled an immense data bank that can be studied profitably for a long time in the future" (Fattu, 1967, p. 525). This proposition is evidenced by the in-depth interest of this paper in the FIM survey. King (1967, p. 362) concludes on the doubtlessly positive outcomes of the study: "Without any doubt, the International Study of Achievement in Mathematics will go down in educational history as a revolutionary example of the application of science to education. It will be long valued as a mine of important information, and as an example of method (its primary objective)" and adds on that "the great merit of the present survey is precisely that it has done a pioneering job" (p. 359).

Conclusion

This paper discusses the key contribution of the Swedish educationalist Torsten Husén, who is by all means the most prominent representative among the Nordic comparativists, in relation to his outstanding work and strong influence on the development of the empirically oriented science of Comparative Education in the 1960s and 1970s of the 20th century. That was the time when the International Association for the Evaluation of Educational Achievement (IEA) was established and the first cross-national surveys on students' achievements were implemented – The Pilot Twelve-Country Study, The First International Mathematics Study, and The Six-Subject Study under the auspices of Husén as a co-founder and a chairman of IEA between 1962 and 1978.

These early IEA studies were conducted with the primary aim to make cross-cultural, output-oriented educational comparisons. They all proved to be entirely successful, doing a pioneering job at that time. The pilot study proved the possibility to devise internationally valid achievement tests in some subjects, to make adequate translations into different languages and to conduct processing and analysis of the data from all the countries involved at one place. The success of this study led to The First International Mathematics Study, which represented the "IEA initial attempt to identify factors associated with differences in student achievement" (Nedrished & Griffith, 1992, p.12). The overall aim of the third rather ambitious Six-Subject Survey was to use international tests in order to relate student achievement and attitudes to instructional, social, and economic factors, and from the results to establish generalizations of value to policy makers worldwide (ERIC). Without the successful performance of these early studies, which resulted in an immense bulk of publications thus enriching the potential of Comparative Education and building on its empirical approach to educational matters, one could not assume today's significant role of IEA in conducting large-scale comparative studies of students' educational achievement leading to improvements in quality of education across the globe.

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COMPARING LABOR INSERTION OF GRADUATES FROM TWO AREAS OF KNOWLEDGE IN THREE MEXICAN LOCALITIES

Abstract

Engineering programs are commonly supported by higher education policy and planning initiatives on the grounds of a supposed saturation of the labor market by other types of educational programs. However, labor market saturation is dependent on the economic characteristics and the sociocultural capital of specific locations. The aims of this study were twofold: (1) to examine the differences in the labor situation and wages earned by graduates in law-administration, and engineering in three Mexican localities (Reynosa, Victoria and the Tampico-Madero-Altamira metropolitan area); and (2) to identify the factors related to those differences. The research questions addressed were: What working positions do graduates acquire by disciplinary group and locality? What wages do graduates earn by disciplinary group and locality? What factors influence graduates' positions and wages? Results indicate that engineers were not always better located and paid than the other group.

Introduction

For the purpose of this study, the concept of labor market is considered as the place where supply and demand of work meet (Navarro Leal, 2000). "Labor insertion" is understood as the achievement and performance of graduates in an economic area or sector (Barrón, 2003). "Labor location", on the other hand, is defined as the position of graduates in the segments of the organizational hierarchies of business (Carnoy, 1977). Finally, a graduate is an individual who has successfully completed a four-year long program of higher education (Navarro Leal, 2000).

Theoretical approaches to examine the complex relationships between the world of education and the world of work may be grouped in two schools of thought (De Vries, Vazquez-Cabrera & Rios-Treto, 2013; Muñoz Izquierdo, 1996; Navarro Leal, 1982). The first group of theories is supported by classical economics, such as the theory of Human Capital (Denisson, 1972). The second group includes emergent or alternative theoretical approaches that cast evidence of the insufficient explanatory power of the Human Capital theory. These theories are based on explanations of the sociology of education, examples of which are: screening theory, diploma disease, and market segmentation theory, among others (Carnoy, 1977).

Research carried out in the State of Tamaulipas, Mexico, has analyzed the working conditions (employment, unemployment, and misemployment), wages, occupations, and locations of graduates in different disciplinary fields. Results have shown that to explain positions and wages of graduates in the division of labor, categories that come from the so called "emergent" theories are required. These categories include non-school terms that refer to the social class and gender of graduates (Navarro Leal , 2000)

More recent research has shown that graduates of the same program have different opportunities of insertion and levels of wages in different places of the state of Tamaulipas. These results have led to other research questions related to the

factors of the local contexts that have different specific weights in conditioning the insertion of graduates and the corresponding wages in the labor market (Navarro Leal, Lladó, Sánchez & Cruz, 2009).

Lessons learned from previous research indicate that the economic structure of the specific localities, the relative intensification of the supply of professionals of different fields of knowledge, the social and political characteristics of the population and organizations, as well as the growing flexibilization of some professional practices in emergent conditions of "outsourcing" should all be fully taken into account when formulating higher education plans. This study considered these issues to compare two professional groups: one that includes different fields of engineering and another that includes professionals from law, accountability and business administration.

Methodology

In the state of Tamaulipas, located in the northeast corner of the country, there are 206,144 individuals who completed with higher education studies. From these, 27,293 are in Reynosa, 37,353 in Ciudad Victoria and 74,125 in the metropolitan zone of Tampico-Ciudad Madero-Altamira. To calculate the sample, we used the formulae recommended by Fisher de la Vega and Navarro (1984) for populations of less than 500 thousand subjects. The sample sizes for each locality were the following: Reynosa = 818; Victoria = 819; and the metropolitan zone = 819. To investigate the proportion of law-administration, and engineering graduates in each sample size, we worked on two assumptions:

Assumption 1

The distribution of professionals by fields of knowledge in Tamaulipas reflects the structure of enrolments in the Mexican higher education system by fields of knowledge. This assumption implies that the distribution of graduates in the State of Tamaulipas and enrolments have a similar structure.

Assumption 2

In the absence of a directory of graduates, by fields of knowledge and localities, the probability of the field worker finding a graduate from one of the two groups is the same.

When analyzing Assumptions 1 and 2, it was taken into account that the fields studied does not consider all fields included in the statistics of higher education, and do not include all professional fields by knowledge area, therefore actual proportions by professional fields are unknown.

In focusing the problem from this view, decision was taken assuming that professionals could be found at their homes up to accomplish half of the sample size of a group and to accomplish the other half of the other group. Having the two groups of the same size allows for the comparison of pairing variables from both of the sets of attributes.

The following set of principles was adopted for the administration of the questionnaires:

1. The group of engineers was to be represented by graduates from the fields of electricity, electronics, mechanics, industrial, or equivalents.
2. The group of law & administration was to be represented by graduates from the fields of law, administration and accountability.

3. The amount of questionnaires to be administered in each locality would be around 800, considering a half of them for each group.
4. The questionnaires were to be supplied not at work but at home of the graduates since we are also including information from those who are unemployed.
5. To make sure that samples were representative of different socioeconomic situations, the questionnaires were to be proportionally supplied among different sectors of localities, therefore different sectors were considered as: a) high socioeconomic level, b) medium-high socioeconomic level, c) medium-low socioeconomic level, and d) low socioeconomic level.

Main findings

The empirical research in three localities of Tamaulipas, Mexico, with different economical characteristics, allows for reflections about relativity of theories to make thorough explanations about relations between the worlds of education and work, given that socioeconomic and educational features of localities differ and are determinants. Engineering and law-administrative fields were selected for being contrasting fields that allow for room for different comparisons about the working insertion of graduates in different localities.

Graduates working position and income in the metropolitan area
The metropolitan area of Tampico-Madero-Altamira as an integrated labor market expands opportunities of inhabitants to live in one of these cities, to study in a second and to work in a third city. On this integrated scenery, the size of the industrial sector is larger than the one that Tampico could have by itself, where traditionally the sector of services has been the largest, especially by the branch of commerce.

The supply of professionals from the law-administrative fields is very large in terms of the amount of university programs and enrollments in such a way that competence among them is higher than the competence among engineers when applying for a job. On this scenario the engineers working position and income is better off than professionals from law-administrative fields. A student t test indicated a statistically significant difference between the two groups.

Graduates working position and income in the city of Victoria
In the City of Victoria findings are different from above. There is not a significant difference in the work insertion neither in the incomes between the two professional groups. In the economic structure of this locality highlights the governmental service which is three times larger than the industrial sector, in terms of the proportions of the Economically Active Population (EAP).

This finding led to explore other non school factors, like those related with social class, working segment of the father's job, real estate properties, but in none of these significant differences were found. But when analyzing gender relations it was observed that in the sample of graduates from engineering there were just a little amount of women, around a tenth; while in the sample of graduates from law & administration women were the halve of the subjects.

The analysis of the differences related to the segments insertion and incomes between men and women showed a statistically significant difference in favor of

men. On the other hand, as women represented a 50 % of the graduates from law & administration, but with a segment insertion and income lower than the engineer's, it could be assumed that if women could get an insertion and income similar to men, this group would be able to equalize its position to the engineer's. The consequence would be that in the City of Victoria, by the size of the services sector, this group would be better positioned and paid than the engineers. In any case this point could be a research project by itself.

Graduates working position and income in Reynosa

Results for Reynosa were different from those of Victoria. Engineers were living a more favorable circumstance in terms of sectorial structure and intensity of educational supply. Firstly, the industrial sector of Reynosa is similar to the services sector in terms of their proportions in the Economically Active Population. Secondly, the intensity of the supply was similar in both cases. Although the programs and enrolments of engineering were larger than those for law and administration, the number of graduates was not very different. For instance, in the school year 2005-2006, there were 608 graduates from engineering, while there were 628 graduates from the law & administration fields. It was expected that in equality of circumstances there were no significant differences between the two groups. Nevertheless engineers were better located and paid than the other group. The analysis should be extended to include non-school factors related to social and cultural capital.

Recapitulating, on the factors conditioning a better labor insertion and income of graduates, it was found that it was not enough to have a high scholarly level. However, graduates were required to live in a location with the right circumstance of pertinence and competence. In short, this was the main original finding of this research on the relationships between higher education and work.

Recommendations for further research

Findings of the study suggest that the concept of pertinence has a different value for each locality and that the level of pertinence of programs depends on the specific local circumstances. Therefore, planning of higher education should not be based on subjective judgments such as "market saturation" and more consideration should be given to "professional elasticity", "professional substitution" and "flexibility of labor". Higher education should be conducted on the basis of research to support the supply and reorientation of educational programs for specific socioeconomic contexts, rather than macroeconomic needs.

Results call for new lines of research and projects. For instance, in Victoria requires more studies on issues of gender; women seem to resist studying engineering. Also, the government is the main source of employment in Victoria and little is known about its hiring policies and gender equality practices.

For the case of Reynosa it is possible that a higher competence in the supply of professionals (or a high rotation) brings different effects among economic sectors. For the industrial sector it is possible that a higher competence among the engineers brings as a consequence a new need to retain them in the firms, by means of better salaries, while probably this will not be the case for the graduates from the law & administration.

This research also gives input for the design of public policies, which for their effective evaluation should consider research on the specific circumstances of the localities, otherwise it will be difficult for higher education to contribute with opportunities for new generations to find their place in the dynamics of development.

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A (NEW) DISCURSIVE FRAMEWORK FOR DEALING WITH THE PROBLEM OF UNSAFE SCHOOLS

Introductory remarks

The problem of unsafe schools, in the sense of schools being afflicted by incidences of violence, crime and general anti-social behaviour, is a worldwide problem (Skiba & Peterson, 1999: 1-11; Bucher & Manning, 2010: 160). Not surprisingly, the literature on the subject tends to centre on two issues: understanding the problem, and avoiding or combating the problem (Skiba, 2012: 27). This paper focuses on the second by presenting a discursive framework for thinking about school safety based on four premises about tolerance, and by particularly focusing on the capability approach.

Two less acceptable approaches to tolerance as measures to ensure school safety

The standard approach to tolerance

The standard notion of tolerance is where a person or institution with power imposes certain actions to address a problem (Galeotti, 2014: 2). According to Galeotti's definition of this approach, a principal and school governing body, as the potential tolerators of the unacceptable practices, views and actions of certain learners in the school, have the right to interfere (accept or reject) with such practices because they possess the power to do so. This, as she indicated (Galeotti, 2014: 2, 5), was typical of despotic rulers who governed "from above" and dispensed justice as they saw fit.

This "vertical" notion of tolerance is unacceptable as a means to ensure school safety. It is at odds with the rule of law and with the doctrine of human freedom and basic rights that is characteristic of liberalism in a democracy. The normative theory of liberalism has changed tolerance from an act of grace "from above" of the sovereign to recognition of the universal rights flowing from the liberty of citizens.

Zero tolerance policies

School managements tend to adopt a zero tolerance policy when serious violence is perpetrated in the school to such an extent that normal pedagogical measures in their opinion cannot counteract the problem (Skiba & Peterson, 1999: 1). Zero tolerance policies usually take the form of a set of rigid descriptions of what is regarded as unacceptable behaviour combined with a similarly rigid set of actions that have to be taken to remove each problem from the school (Daniel & Bondy, 2008: 1). The prescribed action seldom leaves any discretion to educators, the principal, school administrator or the governing body, and more often than not leads to the suspension of a learner or even expulsion from school. A zero tolerance policy presupposes the use of all kinds of punitive or retributive punishment.

Zero tolerance policies have been criticized for various reasons, including the fact that a promising learner might be deprived from education after just one misdemeanour. Educators and management tend to over-zealously apply the norms

of zero tolerance. The policy leaves very little discretion to educators and school managers. A zero tolerance policy is a simplistic, standardized and often inconsistent approach to a complex problem (Skiba & Peterson, 1999: 7, 10; Daniel & Bondy, 2008: 1). Its application also elicits issues about fairness and equity and it could be harmful to establishing a culture of respect for human rights. It tends to give equal treatment to unequal situations; it is a form of generalised retribution for a generalised evil (Skiba & Peterson, 1999: 9). To treat learners in this manner amounts to an a-pedagogic, even anti-pedagogic approach to learners, an approach characterised by a lack of caring, understanding and individualization. It criminalizes young people, which is unacceptable in an educational context. In addition, suspension and expulsion work contra-productively in terms of expected school outcomes. It is furthermore based on retributive and punitive justice instead of preventive measures. It treats both major and minor incidents with equal severity (Skiba & Peterson, 1999: 3).

It is no wonder that Daniel and Bondy (2008: 1) regard a zero tolerance approach as not equitable, socially responsible or pedagogically justifiable. It only succeeds in sending a message to the students that the administration is still in charge instead of the school taking responsibility for addressing the problems that students might be struggling with. A zero tolerance policy embodies the indiscriminate use of force without regard for its effect, and that is a hallmark of authoritarianism which is incompatible with the transmission of democratic values to children (Skiba & Peterson, 1999: 9).

Another crucial question is whether a zero tolerance policy does not constitute a violation of a basic right of a learner who, for instance, oversteps the line for the first time and gets suspended from learning opportunities. In line with Galeotti's (2014: 3) guidelines a zero tolerance approach should be intolerantly rejected since it also contravenes the harm principle. It would have been more prudent to follow a less rigid policy which allows school managers and governing bodies leeway to decide between omission (to overlook or excuse) and commission (to punish or take remedial steps). To be totally intolerant of others and their behaviours amounts to a refusal to engage with moral dilemmas and shows a lack of understanding, respect and moral imagination.

Four forms of conditional tolerance on the basis of which the safety of a school can be ensured

Tolerance as recognition of differences

The principal and the governing body of a school should keep in mind that, as Furedi (2012: 30-31, 37) has argued, tolerance represents a positive orientation towards creating the conditions where people can develop their autonomy through their freedom to choose how they wish to think, believe and behave, each in his or her own way. As such, tolerance is clearly one of the most important democratic values (Saulius, 2013: 49).

For the principal and governing body to be tolerant involves decision-making based on the value system and ethical standards of the school, reasonable argument, a respect for difference (Potgieter, Van der Walt & Wolhuter, 2014: 3), the freedom in which one can express oneself (Joe, 2011: 6) and the context in which a certain view is expressed or a certain behaviour is conducted (Van der Walt, 2014).

Tolerance affirms the freedom of conscience and individual autonomy of both the tolerator and the tolerated (Furedi, 2012: 31). Tolerance therefore represents a positive appreciation of the necessity of diverse views and conflicting beliefs (Furedi, 2012: 37).

In line with Boersma's (2012) view, it can be said that the freedom and autonomy of the individual should not be seen as absolute and total. Learners are not totally free to do as they wish; they have to conform to the standards set by the school. This does not mean that the school authorities have to be tolerant of all views and behaviours. To be tolerant does not mean to be non-judgmental, uncritical of the views and actions of others, or that educators do not have the right to evaluate and to discriminate (distinguish between what is acceptable and what not) (Furedi, 2012: 31-37; Boersma, 2012). They may indeed be critical of learners / students, their views and behaviours but this does not mean that they reject them as human beings. Their wish to peacefully coexist with them does not deprive them from the right to differ from them on the basis of their own strong views, rooted as all personal views are in personal value systems. To be truly tolerant of others and their differences does not mean that the school authorities should be blind to the personal, social and cultural contexts in which a certain action is couched. Daniel and Bondy (2008: 13) are correct in stating: "Equal treatment in an unequal social and academic environment is discriminatory."

It is clear that the concept of tolerance only makes sense in the context of difference(s); if we were all the same, there would have been no need for tolerating others, their views and behaviours (Saulius, 2013: 50). Tolerance only comes to the fore when an individual realises that s/he has no alternative but to tolerate the views and behaviours of others from whom they differ for the sake of peaceful coexistence in the school. Tolerance as recognition of differences, besides acknowledging that all members of the polity have the same basic human rights, aims at the recognition of the differences among people as legitimate components of contemporary pluralism. In this way, the bearers of those differences are seen and accepted as full and equal members of the polity, in this case the school (Galeotti, 2014: 9).

Tolerance as empathy and compassion with others

The school authorities have to understand the moral problem that the perpetrator of the violence presents them with. They have to show empathy with his or her situation and through the application of moral imagination place them in his or her shoes. This will help them understand what drove the learner to that particular form of behaviour and might also suggest certain steps for successfully addressing the problem (Skiba & Peterson, 1999: 9-10; Daniel & Bondy, 2008: 15-16; Bucher & Manning, 2010: 160-163). While dealing with the person and the moral problem that he or she confronts them with they are allowed, indeed expected, to express their own judgment of the perpetrator's views and behaviours, evaluate the behaviour in terms of the norms of the school as formulated in its code of conduct, but all of this should be done with the ideal of peaceful coexistence in the back of their mind. It is important to note that refusal to engage with others about the motives and principles of their actions can be seen as a lack of understanding and empathy, and hence as intolerant behaviour (Nussbaum, 2001: 417; Wright, 2009: 413-428; Saulius, 2013: 54).

Tolerance as respect for others and their rights

All members of a specific society or polity should enjoy the same measure of respect (Galeotti, 2014: 8). In liberalism, tolerance has a much wider scope than in the standard approach: not just freedom from persecution by those in power but also respect for the equal rights of all citizens. In addition, authorities in a liberal society such as school governing bodies should feel themselves bound by only three principles: the principle of neutrality, the promotion of a positive modus vivendi and the harm principle (Galeotti, 2014: 5). In this context, tolerance constitutes one of the most important preconditions for social justice, fairness and democracy; without it we cannot be free, and we cannot live with one another in relative peace (Furedi, 2012: 30-31, 37). In a liberal, human rights context, political and state institutions are not supposed to express any likes or dislikes or approval or disapproval of views but should only provide conditions for their peaceful coexistence (Galeotti, 2014: 5). This implies that only in cases where the views or acts of a person disturb the peaceful coexistence of the members of society or of a school, may steps be taken against the transgressor. The problem here is, however, that in (school) communities constituted by a majority and many minorities the neutrality of the governing body might become compromised through being dictated to by the social standards of the majority, which then become the standard for all behaviour in the school (Galeotti, 2014: 6).

The act of tolerance demands reflection, restraint and respect for the right of other people to find their own way to the truth (Furedi, 2012: 32), but this does not mean that one has to uncritically and non-judgmentally accept what others believe and do (Joe, 2011: 8). Acts of judgment, evaluation and discrimination are integral to the act of tolerance. Efforts to evade the challenge to engage with moral dilemmas can be seen as a way of avoiding difficult moral choices (Furedi, 2012: 32). Schools and school governing bodies, in their capacity as organs of the state are in no position to permit or to deny a learner to do or wear anything that is within the bounds of the law. All it can do is to legitimize in the form of a public declaration that a given practice or behaviour, if it does not infringe on any right as enshrined in the Constitution of the country or the schools act of the country, is legitimate in a pluralist society (Galeotti, 2014: 10). By the same token, a view or an act that infringes upon any right as inscribed in the law of the country may and should be denounced and the necessary steps taken to counter it.

Tolerance as the development of the inherent capabilities of others

One has to keep in mind that the school is a complex organisation: it will always remain difficult to envision how every stakeholder in the school can think, choose or act without being influenced in one way or another by the working of all the influences around them (Sen, 2010: 244-247). It is therefore unacceptable to apply a one size fits all type of approach to school violence. A school is a complex societal relationship in which various stakeholders are involved and in which the interest of every participant should be striven for (Ng, 2013: 45), including that of a perpetrator of violence. A violent incident might be a symptom of a much more complex problem in the school or in the community; simplistic answers and reactions therefore might not be appropriate. While attending to the matter of procuring a safe school, the principal and the governing body should be aware of the fact that the situation is fraught with imponderables and non-describable uncertainties and that

they will have to deal with these to the best of their ability (Möller et al., 1999: *passim*). They have to extract from the situation what they think might work to ensure a safe school.

The capability approach (CA), applied together with complexity theory, provides a suitable normative framework for the principal and the governing body to assess and evaluate the well-being of all in the school, and the social arrangements in the school that would lead to a positive school climate and to school safety. The main focus of the CA is what all the people connected to the school are able and willing to do effectively, their capabilities as human beings (Robeyns, 2005: 4). The school management should focus on the premise of capability theory that all the people connected to the school should be helped to be and to become what they are able to do in a way that is worthy of their dignity as human beings (Nussbaum, 2000).

The constraints of a conference paper do not allow exploration of all the possibilities of a capability-couched-in-complexity approach to the issue of ensuring school safety. I can only draw an outline. Firstly, school management and educators should ask what the educators and the learners in the school are able to do, and what they value as human beings. They then have to ask themselves what they can do to promote the well-being of all and the good life that is desired by all concerned, and how they can form the school into an equitable and just society. The third step is to determine as far as possible what each participant in the school values and how they can be supported to attain those values, particularly how they can be supported in making decisions towards those ends. Educators should afford all learners the freedom to strive for such valued ends, thereby helping them flourish as engaged actors in bringing about the school that everyone wishes for (Cockerill, 2014: 13). To be able to do all of this, educators should possess the necessary "practical wisdom" (*phronesis*) or good judgment to make assessments and decisions about how to act to help their students to achieve basic social goods in ways which enable a good life and which shape the *habitus* of each learner. As Bessant (2014: 150) points out, this does not mean to allow the student free reign as far as taking decisions and acting are concerned; it rather means to possess the capacity to be context-sensitive, to know each student and their needs, their dispositions and interests, and to know how to guide the student in choosing between viable alternatives, and in working out how to pursue the ends they value. In practice, says Bessant, it means helping students establish how and why they might act to change aspects of their lives for the best, and what action is required in specific situations to achieve that. Each educator should develop for him- or herself a "phronetic pedagogy."

The value of the CA lies in the fact that it centralises issues such as the freedom of individuals, their right to choose, their capabilities, the good life in and of the school and all concerned, diversity, values, differences, complexity, care, affiliation (which requires trust and cooperation; the capability to make sound judgements through critical sensitive interpretation, and the capability to relate to others with compassion, care, and with respect for the dignity to every individual (Cockerill, 2014: 14)), deliberation, ethical enquiry, reflective practice and social action in our efforts to make schools safer places. The capability of affiliation with the school and with all of those in and attached to the school is of the greatest importance in the

establishment of a school as a safe place, given that Nussbaum (2001: 417) defines affiliation as "being able to live with and towards others, to recognise and show concern for other human beings, to engage in various forms of social interaction, to be able to imagine the situation of another…[and] being able to be treated as a dignified being whose worth is equal to that of others."

Concluding remark

The last four premises regarding tolerance and capabilities provide the vocabulary necessary for reflection about the creation of schools as safe places. As Skiba (2012: 28, 33) rightly concluded, safety in schools and academic opportunity are not exclusive. By employing strategies to teach learners what they need to know to get along in school and society, we strengthen the learners, the social systems and communities.

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BEYOND TOLERANCE: EDUCATING FOR RELIGIOUS RESPECT AND HOSPITALITY IN PEDAGOGIC-MULTILOGICAL SANCTUARIES

Abstract

Drawing on the methodological framework of conversational analysis, this paper explores aspects of multilogical participation in pedagogically safe spaces with regard to religious respect and hospitality as life skill. I argue that these spaces should be conceived of as pedagogically justifiable and educationally guaranteed sanctuaries of and for multilogical-educative participation (i.e. teacher–learner(s) and learner–learner interaction) with regard to religious respect and hospitality.

Background and rationale

Incidences that all attest to the measure of religious intolerance that prevails in the modern world, have risen sharply in recent years. They increasingly prevent ordinary citizens in most countries in the world from openly exercising their freedom of opinion and religious expression (UNESCO, 1995, p. 2; cf. also Potgieter, Van der Walt & Wolhuter, 2014, p. 1). Recent scholarly publications (cf. Van der Walt, Potgieter & Wolhuter, 2010; Van der Walt, 2011; Van der Walt & Potgieter, 2012; Potgieter, 2014; Potgieter & Van der Walt, 2014; Potgieter, Van der Walt & Wolhuter, 2014; Wolhuter, Potgieter & Van der Walt, 2014) not only lament this rising tendency, but also seek, from a scientific point of view, to explore, explain and understand this worrying state of affairs.

Incidences of religious intolerance also threaten the consolidation of peace and democracy, both nationally and internationally (UNESCO, 1995, p. 2). It endangers human lives and livelihoods, and it jeopardizes civilization itself, as we know it. Law (2011, p. 207) argues, for example, that one cannot reason or argue with people who behave religiously intolerant towards people of other religious persuasions. Because the attitude, on which their religious behaviour is based, effectively amounts to mental slavery, dogmatism and repression (Morton, 1998, pp. 172-173), it is practically impossible to make religiously intolerant people recognise and understand that what they are doing might be morally and ethically wrong. They simply will not listen to reason (Law, 2011, p. 207). Grayling (2007, pp. 110-111) point out that people who behave religiously intolerant may even go as far as to murder those whom they see as infidels and apostates. They almost always regard themselves as very good people and they see what they do as absolute obedience to the will of their deity. The recent spate of videos released on YouTube by ISIS (revolutionaries from the so-called "Islamic State of Irak and Syria") that show – in graphic detail – the beheading of foreign journalists, so-called 'spies' and members of other faith communities, such as Christians, serves as an excellent case in point.

All this begs the question whether schools should not – as a matter of the greatest urgency – consider offering all their students[1] opportunities to learn specifically about religious respect and hospitality, as part of their official curricula and to do so in multilogically[2] safe, pedagogic sanctuaries[3]. If we can answer this question in the affirmative, then communities should be able to trust their schools to become and to be pedagogic sanctuaries where teachers and students alike may, above all, practice the *Homo Nolens* art of sense-making and meaning-sharing.

After outlining the problem and clarifying the concept of religious respect and hospitality, I share my own understanding of the construct *pedagogy* and then introduce the theoretical background of conversational analysis as my preferred methodology. This is followed by a few brief comments about the notion of "safe schools", after which I proceed to argue my thesis, namely that schools should be re-conceptualised as pedagogically justifiable and educationally assured sanctuaries of and for teaching-learning related, multilogical participation (i.e. teacher–learner(s) and learner–learner interaction) with specific reference to religious respect and hospitality.

The problem and the concept that is part of it

Given the above-mentioned background, it should be noted that a fair amount of conceptual muddle, under-theorisation and a lack of conceptual mapping still typifies much of the literature on pedagogic safe spaces and classroom-based multilogic-educative participation around religious tolerance as essential life skill. The following three questions that should, for example, be asked of the current state of professional knowledge regarding religious tolerance-related pedagogy still remain largely unaddressed:

- Do we have a coherent theory of religious tolerance instruction, or is the field still divided by ideological barriers, with no way of adjudicating the claims of competing theoretical and conceptual assertions?
- Do we have well-defined religious tolerance pedagogies, derived from and feeding into the theory, that are effective in suburban and rural schools across the globe?
- Are life orientation teachers able to operationalise this professional knowledge to teach religious tolerance effectively?

The Habermas-Derrida debate on the concepts of "tolerance" and "hospitality" is well captured in *Philosophy in a Time of Terror* (Derrida, 2003). Although

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[1] In my country, South Africa, children of school-going age are often referred to as "learners". To make my paper more accessible to colleagues from other countries, I refer to learners of school-going age as "students".

[2] The concept "multilogue" was first coined by Peter Newman, in 1999. (cf. http://acrwebsite.org/volumes/8339/volumes/v26/NA-26 for a copy of his article.)

[3] I deliberately avoid referring to schools as "safe spaces". I regard this concept to be conceptually lacking. Instead, I re-conceptualise schools and individual teachers' classes in terms of pedagogic sanctuaries – spaces that should be intentionally designed and maintained to provide multilogical refuge to students; spaces where they can experience authentic and pedagogically justifiable conversational safety from pursuit, persecution, disrespect, ridicule or any other danger or form of personal embarrassment or indignity.

Habermas defended the notion of "tolerance" on legal and ethical grounds (Keet, 2010, p. 7), I am of the opinion that at least part of the under-theorisation referred to above, can be attributed to the fact that the concept "religious tolerance", to quote Derrida (2003, p. 16), still manages to display "... a Christian matrix ... [meaning that] if I tolerate I accept the other as a subordinate, not as an equal [...] indeed tolerance is first of all a charity [...] a paternalistic gesture". It seems that the notion of tolerance mostly designates an acceptance of something less than myself. Keet (2010, p. 7) therefore argues that the concept of religious tolerance cannot be salvaged theoretically or conceptually and that it needs to be abandoned legally and ethically. Derrida argues that it should be substituted with the concept of hospitality, because "pure and unconditional hospitality is in advance open to someone who is neither expected nor invited" (2003, p. 17). Hospitality, *per se*, is furthermore immersed in the semantic values of unprejudiced respect, dignified communality and truthful, authentic engagement (cf. Keet, 2010, pp. 7, 8).

It is for these reasons that I propose using the concept of religious respect and hospitality in this paper instead of reverting back to the more established concept of "religious tolerance". If the three fundamental questions mentioned above were to be rephrased in terms of the concept of religious respect and hospitality, I am sure that the methodological framework of conversational analysis could catalyse our research efforts in this regard.

Conversational analysis as methodological framework

Described as the "science of teaching", *pedagogy* essentially refers to the art, practice or profession of teaching. It relates to how teachers should teach (theory) and to the various ways they can use to control and guide their students (practice) (Hotam & Hadar, 2013, p. 388). For purposes of this paper, I propose expanding the concept's semantic range to provide also for a performative and, especially, a participatory (i.e. a communal, engaged and conversational) understanding of the concept based on what I think should be happening in schools as pedagogic sanctuaries with regard to the teaching and learning of religious respect and hospitality. I therefore align myself methodologically with Mori and Markee's (2009, p. 1) framework of conversational analysis.

Conversational analysis has convincingly demonstrated that the social organization of classroom-based conversational engagement-in-interaction shapes and contributes to teaching and learning processes. Schwab's work (2011, p. 4) confirms this claim. He shows that learning can best be understood as a process that always takes place within a certain social context. His work also validates the claim made by conversational analysts that participation is ontically essential to learning (ibid.). Since religious respect and hospitality presupposes, almost by default, a particular social intelligence, it is logical to assume that the teaching of and learning about religious respect and hospitality should also be regarded as a fundamentally social enterprise, jointly constructed and intrinsically linked to students' repeated and regular conversational participation in such classroom activities (Schwab, 2011, p. 4). The teaching of and learning about religious respect and hospitality can, in any case, never be deprived of particular social contexts. It can, furthermore, never be regarded as an individual process or enterprise. Instead, it essentially remains a participatory, social endeavour (Mori & Hasegawa, 2009). Participation and learning

about religious respect and hospitality are therefore not representative of two separate pedagogic epistemologies. Instead, they should rather be (re-) conceptualised as being more or less synonymic: as one participates, conversationally, in a supportive educative environment, one learns and as one learns, one participates through, *inter alia*, conversation. After all, the participation structure of face-to-face, pedagogically justifiable interaction about religious respect and hospitality is not only extremely complicated; it is also co-determined by the different roles of a number and variety of speakers and listeners in a planned pedagogic environment and the alignment of their verbal and non-verbal actions with regard to, in our case, religious respect and hospitality.

So, in light of the work of, especially, Schwab (2011), I would like to venture that the quality of the learning that students will do about religious respect and hospitality will, amongst others, depend on their repeated conversational participation in classroom-based, pedagogically justifiable religious respect and hospitality-related activities with other more competent participants, as they progress through the school from grade to grade and provided that their school is constitutive of a safe, pedagogical sanctuary.

Schools as pedagogical sanctuaries: broadening dialogue to embracing multilogue

School-based education is not just aimed at the teaching and learning of academic subject matter. Education in or at school also has the broader purpose of forming, character formation and inculcation of the upcoming generations into the mores, habits, customs and practices of the social structures of which they are fledgling members (Wolhuter, Van der Walt & Potgieter, 2015, p. 356). For this reason it can be argued that the school as societal relationship or social institution should be, or should constitute a pedagogical sanctuary for both these forms of education to come to fruition (ibid.). Not only should teachers as educators in the broader sense of the word be able and willing to create pedagogical sanctuaries for their students – in their own classes – to learn and master learning content about religious respect and hospitality in accordance with certain criteria or outcomes, but they should also provide pedagogical sanctuaries for the students as educands to become – in due course – mature and responsible young people who can enter the world competently and confidently.

For this to happen, classroom-based dialogue should be widened to make provision for multilogic-educative participation. Schwab (2011, p. 5) does exactly that. He suggests that the concept of classroom-based participation encompasses all actions that continuously demonstrate forms of educative involvement performed by teachers and learners within evolving structures of pedagogically justifiable conversation. It is against this methodological and conceptual backdrop, then, that I wish to rethink the notion of classroom-based dialogue about religious respect and hospitality.

In education, dialogue is usually considered a two-way communication – at best an oral dialogue between a teacher and one of her learners at any specific time; a working method that the teacher employs to create interaction within contextualised, dialogic-educative spaces (cf. Leganger-Krogstad, 2014, p. 124). However, as far as the civically sensitive issue of religious respect and hospitality education is

concerned, it seems that this particular understanding of dialogue might be conceptually somewhat restrictive and pedagogically contentious. Expanding on the work done by Leganger-Krogstad (2014, pp. 104-128), I therefore propose the concept of pedagogic "multilogueing". In its simplest form, the concept "multilogue" refers – logically so – to pedagogically intended, face-to-face interaction including more than two participants, e.g. a teacher and one of her learners at a time. For this reason, I suggest that authentic teaching-learning environments should, instead, provide for and enable the establishment and maintenance of pedagogic sanctuaries for multilogic engagement and interaction around the issue of religious respect and hospitality.

Such spaces can, perhaps, best be explained with reference to Rule's definition (2004, p. 1) of dialogic space as a cognitive and socio-conventional space where role-players can mediate within a non-threatening environment[4]. Creating pedagogic sanctuaries for open, yet focused and substantiated multilogueing, built on mutual trust, support, respect, honesty, critical thinking and open, clear communication about issues of religious respect and hospitality, will provide both teachers and learners with a practice ground for classroom-based discussions without fear of pursuit, persecution, disrespect or ridicule.

Religious respect and hospitality-related multilogueing intentionally seeks to extend the conventional notion of classroom-based dialogue between teacher and learners by introducing additional "voices" (besides that of the teacher and her learners) for the duration of any teaching-learning opportunity. Besides the teacher and her learners, these voices might, therefore, also take the form of a variety of pedagogic tools and strategies of and for mediation between the teacher and her learners. They might, for example, include (depending on the class itself, as well as on the nature and scope of the relevant curriculum topic and concomitant subject matter) material artefacts, theoretical cognifacts, political, traditional, lifestyle and communal cultifacts, values-driven teleofacts, or even practical tasks. However, the teacher remains responsible – at all times – for the interaction in her classroom. S/he designs and creates a pedagogical sanctuary, and chooses what educational material to pay attention to (Leganger-Krogstad, 2014, p. 104); s/he is the one who sets up the rules for the multilogues in her classroom in order to facilitate pedagogically fruitful interactions around issues of religious respect and hospitality.

Conclusion

The teaching of and learning about religious respect and hospitality is not only a moral, but also an educative obligation. Within a pedagogically safe, multilogic santuary, it is the teacher's pedagogic duty to use her classroom language skills to stay ahead of her learners and to *scaffold* her learners to be able to enhance the next step in their learning process. The pedagogic tools and strategies provided for in pedagogic sanctuaries are expected to help mediate the teaching and learning process and to help all role-players to interpret and construct appropriate sets of mutually beneficial understanding with respect to religious respect and hospitality. This requires her to choose the tools and strategies that she will be using on the basis of didactical considerations to enhance the religious respect and hospitality-related

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[4] Cf. footnote 3 above.

multilogue and to aid knowledge creation, sense-making and meaning-sharing (cf. Leganger-Krogstad, 2014, pp. 106, 123). The tools and strategies should, therefore, be designed, selected and operationalised in such a way as to provide enough learning scaffolding – through information – to become authentic – yet additional – voices in a particular pedagogic-multilogical, educative setting (Leganger-Krogstad, 2014, p. 113).

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PEDAGOGY OF DISCERNMENT, NEW WINE IN OLD SKINS?
A RESPONSE TO POTGIETER

Abstract

In his 2014 paper Potgieter presented a number of pertinent questions on education in a post-modern world. In this article I not only challenge some of the views informing these questions but also raise additional questions for debate and critical analysis. Two pertinent issues, both with religious undertones, are addressed, viz.: a) whether the construct, "evil", as employed by Potgieter in his argument, could be used as basis for the development of a theory on education; and b) whether a pedagogy of discernment could be used as a *primus inter pares.* Using hermeneutic analysis, I argue that the religious embeddedness of these concepts as well as the relativity of claims made could be problematic in terms of a general theory on pedagogy meant to serve as a *primus inter pares*. In contesting Potgieter's argument I therefore pose a number of counter claims for analysis and scrutiny.

Introduction

Science and knowledge development is best served through critical dialogue and debate. Oftentimes conferences serve as a platform for the presentation of new ideas which are seldom interrogated or further explored. One such new idea was presented at the 2014 BCES Conference when Potgieter challenged '…the illusory prestige and power of normative orders' which present themselves 'to every successive generation as the best possible likenesses of and most believable blueprint(s) for eudaimonia (the good life)' (Potgieter, 2014: 1). He argued that it is not the absence, or even the lack of ethics and morals, but rather an oversupply, or "barrage" of ethics, morals and values that lead to the failure of worldwide "educational efforts … to restrain, control and/or overturn the ever-increasing incidence of evil in society". He argues, moreover, for the need to conceptualise the term "education" in ways that would highlight the "…phantasmatic claims and essential fallibility of humanity's treatment and application of ethics, morals and normative systems", asserting that, if the venerable aims of education were, at the very least, "…credible or believable, the incidence of evil in our society should have dropped significantly". Informed by this assertion, Potgieter (2014) presents a '*pedagogy of discernment*' as the *primus inter pares* (first among equals) of all other pedagogies, his central premise seemingly being that, *if education was successful / effective, then the incidence of evil would diminish.*

In this paper I want to respond to Potgieter's argument by using the same hermeneutic methodological process that he used to contest the claims that he made in two contested[1] areas with particular religious undertones, namely:

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[1] There are other aspects that are also open for debate (such as the question whether a theory on education should be based on the deficiency rather than normality; the phastasmatic power of the normative system; and whether discernment could be based on anything other than as set of normative praecipes), but these will not be entertained at this stage.

a) The concept "evil" as a philosophical construct;

b) The pedagogy of discernment proposed as the *primus inter pares*.

In engaging in this debate I start by postulating my understanding of hermeneutics, focusing specifically on the work of Gadamer regarding hermeneutics as research methodological point of departure. I then interrogate the two issues flagged and conclude by offering a possible way forward for academic discourse.

Hermeneutics as research method

Informed by the assumption that pure description is limited in its ability to reveal meaning, Heidegger introduced hermeneutics as a means of studying phenomena. Hermeneutics could be defined as "the theory and practice of interpretation and understanding (*verstehen*) in different kinds of human contexts" (Odman, 1988: 63). From a hermeneutical perspective it is argued that many of the elements that shape our being-in-the-world are hidden and, if existence is to be understood, these elements require interpretation. Heidegger emphasized the importance of our preconceptions. He posited that we experience and understand the world by means of projection and that "an interpretation is never a pre-supposititious free apprehending of something presented to us" (Odman, 1988: 191). Interpretation depends on structures of pre-understanding, that is, on a "framework of already interpreted relations" (Odman, 1988: 66) which anticipates the future and encompasses the person's past and current situation. Understanding and experience are thus inextricably linked. I stance in this regard is that I can only enter a discursive practice based on my own limited knowledge and understanding. We observe what we know (cf. van den Berg, 1979) and, because human knowledge and experience differ so vastly, what we see and understand differ tremendously. This view is in line with the qualitative research principle that the researcher is the research instrument (Guba & Lincoln, 1994), and an instrument can only measure what it is designed to measure.

Emphasizing the importance of language in shaping both our experience and our interpretations, Gadamer (1997) argued that, while this might be problematic, words (concepts, terms, symbols) are the only tools we have to communicate meaning. "*Each word is laden with its own complex set of meanings that are often particular to a specific setting, making it difficult to extract the exact meaning of words. In addition, the meaning that authors try to convey is clouded by their own sets of assumptions, beliefs and values, which render the definitions they may offer always tentative and partial*" (Nieuwenhuis, 2007). In developing my argument I have therefore incorporated the importance of language, paying attention to words used in the process of constructing text, and examining their origins and permutations in order to explore underlying meanings that might illuminate understanding. In addition to stressing the importance of language, Gadamer conceptualized the hermeneutic experience of understanding as being characterized by three metaphors: the fusion of horizons, the act of dialogue and the hermeneutic circle (Thompson, 1990). These three metaphors also inform my own analysis. The dialogue that this paper would like to open is aimed at breaking open the meaning of Potgieter's (2014) previous dialogue with us, so as to broaden our mutual horizons that would lead us to new understandings which would push the boundaries of our knowledge forward.

Analysing the two areas of contestation

Evil as a concept appears to play an important role in Potgieter's (2014) thinking. To a large extent he takes his cue on the meaning of "evil" from the work of Hannah Arendt (1963), who said that she had "been thinking for many years… about the nature of evil". It is fair to say that what she called the "overpowering reality" of totalitarian concentration camps lay behind her preoccupation with the problem of evil, a concern that lasted until the end of her life. But can a philosophy of education be built on notions of evil, a construct intimately associated with religion?

Firstly, it is almost impossible to separate the term, "evil", from religion. If we accept that most religions accept the existence of an omniscient, almighty, ever present and perfect God, then the notion of evil becomes a serious logical problem. Here the classical *hypothetico-deductive* reasoning could be brought to bear (Ratzsch, 1996), namely that:

1. If **A** then **B**.
2. **B**.
3. Therefore, **A**.

Logically then, *if* God is omniscient, *then* God will know of all of the horrible things that happen in our world. Therefore, *if* God is almighty, *then* God should be able to do something about all the evil and suffering, and *if* God were morally perfect, *then* surely God would want to do something to end the evil and suffering. Yet we find that our world is filled with countless instances of evil and suffering. If we were to follow this *hypothetico-deductive logic,* the continued existence of evil and suffering would contradict the theist claim that there is a perfectly good and almighty God. By implication, and through logical deduction, one would then have to conclude either that God created evil or that God does not exist. The challenge posed by this apparent conflict has come to be known as the philosophical *problem of evil*.

My argument is that pedagogy, as a science, should not get itself entrapped in these types of discourse: they are best left to philosophers and theologians. It follows that, to ground pedagogy in a conception of evil, would therefore be fundamentally wrong. If God can't stop evil, how can man/woman (as educator) stop it? Moreover, even *if* we accept that evil could exist as a *secular* concept, *then* the obvious question is, "Who determines that something is evil?" Can it be left to the individual, or is it something that society determines or socially constructs?

The basis of my argument is therefore that "evil" cannot be a relative term. To be useful as a philosophical construct its meaning must be singular and not subject to change. If the killing of innocent women and children, as it occurred during the holocaust (on which Hannah Arendt's notion of evil is based), is evil then the killing of any innocent woman or child is "evil". Innocent women and children died in the bombing of Hiroshima and were still suffering the consequences many years later. Could we look at the nuclear bombing of Hiroshima and claim some higher ground that would make it a noble deed? Was the child massacre in Bethlehem in the times of Christ more or less "evil" than what happened at Columbine High School or during the mass killings in Norway in 2011? How do you measure evil? If a society condones evil for whatever reason (such as child sacrifices in ancient civilizations or the beheading of journalists by the Islamic State) does it make evil less evil?

Whatever answer is proposed to questions like these will most probably be closely related to Arendt's conclusion in *Eichmann in Jerusalem: A Report on the Banality of Evil.* The now famous sub-title of this work, "the banality of evil", refers to Eichmann's deportment at the trial, displaying neither guilt nor hatred, claiming he bore no responsibility because he simply "*...did his duty...*; *he not only obeyed orders, he also obeyed* the *law*" (Arendt, 1963: 135). And herein lays the futility of the concept "evil".

Potgieter's (2014: 2&6) claim that there is an ever-increasing incidence of *evil* in society is not supported by any empirical evidence, thus begging the question whether the claimed increase has been statistically verified or whether it is simply a commonly held perception fuelled by sensation making media giving it prominence in news programmes. Internationally statistics shows a decrease in violent crimes. This seems to suggest that evil is on the decrease.

I would therefore like to propose an alternative to the notion of evil by reverting to the well-established notions of *right or wrong.* These notions are ethically, morally or legally established codes that create a mutually agreed upon basis from which to explore pedagogical implications. The problem is that Potgieter rejects this basis, claiming that people need to "*...liberate themselves from the phantasmatic power of the agents of an oppressive normative system*". I reject this stance. I can deal with something that is legally wrong; I can deal with something that is ethically wrong; and I can deal with something that is morally wrong, because my judgments would be based on standards of eudaimonia (the good life). Using these standards as basis does not imply a passive acceptance of the standards, but an acknowledgement of their usefulness as basis for interrogation, analysis, critique and debate. It is because of the continued human debate and interrogation of these standards that one generation can successfully rid itself of the wrongness of many centuries, such as the end of slavery in Europe and its colonies during the nineteenth century. This generation firmly believed that what generations before them did was wrong and therefore decided to create a different value system. This in itself calls into question the so called "*phantasmatic power of existing normative systems*". Similar examples may be quoted from the recent past such as the recent South African history and the rejection of apartheid and a peaceful transition to black majority rule.

Contrary to Potgieter (2014) I would like to stress the importance of the communal in the socially constructed reality. It is because of this socially constructed knowledge that communities can break free of the values or norms passed on from one generation to the next as the context within which each generation must live changes and with the change comes the need to reinvent and redefine the values and principles by which they need to live (Nieuwenhuis, 2007). It is only if the generations can successfully mediate the process of rediscovery, redefinition and reinvention of values that the young ones would be able to integrate the redefined values into their own unique way of life. Some of these redefinitions may be so radically different that their adoption might change the course of human history, changing that which was accepted as right (e.g. slavery or apartheid) into that which is now wrong. Any pedagogy that makes life possible will therefore need to find its anthropological basis within a socially constructed philosophical theory.

Pedagogy of discernment

Potgieter (2014) proposes the pedagogy of discernment as the *primus inter pares* – the first among equals, and I quote:

Discernment points to the ability of a mature, responsible, whole person… to perceive, recognise, distinguish and apprehend a particular phenomenon or event by separating it from the background radiation of, amongst others, ethics and morals and the addictive nature of the normative systems.

The notion of discernment is neither a new concept nor a concept unique to education. As early as the 14th century Ignatius of Loyola reflected and separated discernment from a theological perspective. Consequently many Catholic scholars today accept that the process of human discernment and decision-making lies at the very heart of Catholicism (Whitney, 2012). Because of the centrality of discernment within the Catholic Church it is important to briefly touch on what it entails and what the principles are that serve as the basis of Jesuit education. Ignatius of Loyola knew that true obedience was rooted not in passivity or ignorance, but in choice founded upon understanding and the will and ability to discern. This is where the five step process known as the Ignatian Pedagogical Paradigm comes into play.

In terms of the Ignatian Pedagogical Paradigm, pedagogy is an educational process that seeks the development of the whole person in service to others, forming "men and women of competence, conscience and compassionate commitment" (Defeo, 2009: 45). Ignatian pedagogy, which is the very core of Jesuit education, combines an Ignatian vision of human beings and the world with a dynamic five-step methodology - context, experience, reflection, action, and evaluation that are meant to "accompany the learners in their growth and development" (Defeo, 2009: 47) and, in the end, to develop the kind of discernment required to know the will of God and choose and do what is right.

Potgieter's (2014) Pedagogy of Discernment shares certain elements with of Jesuit pedagogy, raising the question of whether the former is a case of new wine in old skins. I doubt that Potgieter had Jesuit education at heart when he developed his ideas, but as it happens his notions of both evil and discernment intersect with specific religious notions and I would therefore advice a different route.

Firstly, the notion, to discern, immediately raises the question, "*To discern in terms of what?*" That is, what standards or criteria should form the basis of an action of discernment and who will determine those standards or criteria. Secondly, it raises questions as to the purpose of discernment. Given the centrality of Potgieter's emphasis on "evil" it could be assumed that the purpose of discernment is to reduce evil in the world, but that would imply an ability to discern between "good" and "evil". The question would then be, "How would a person know evil from good in the absence of socially determined norms and standards?" Can it be left to the non-mature person (child) to establish these standards? Given the power of peer pressure, the rise of popular youth culture and the diverse nature of post-modern communities, who will set the standards for discernment?

Conclusion

Potgieter raised important questions in his paper, opening the debate on a topic that has for the past decade, at least in the South African context, given politicians

and administrators the right to prescribe. This, in itself, is an important realization, and the pointers raised by Potgieter are worth pursuing. In my reflection on his work, I have raised some questions that beg further exploration. In answering these questions I suggest that we first establish an anthropological understanding of humanness that could serve as point of departure for our argumentation. In this regard there are three aspects to human nature that no serious education discourse can overlook: our noesis, our technology and our ability to choose. As humans, we have the ability to construct meaning and comprehend the world around us. We also have the ability to create (technics). It is through technology that society is bound together: being both a cultural and an economic force it penetrates into the soul of every person affected by the power of a digital age. As educators we see patterns and extract from them theories of how things fit together. But comprehension is just the beginning of our ability. What makes us truly exceptional among living creatures is our ability to choose our actions and, through those choices, to change our environment with the tools we created. We comprehend nuclear power, but we choose whether to use it for the benefit or annihilation of society.

As mature adults we know these things, and we choose either how we want to educate our young about these things, or abdicate our responsibility to teach them at all. However, irrespective of our choices, every new generation will in the end choose how they live. As adults we can provide beacons or leave it to them to find their own, but let us never forget:

> *I have come to the frightening conclusion that I am the decisive element. …In all situations, it is my response that decides whether a crisis is escalated or de-escalated, and a person is humanized or de-humanized. If we treat people as they are, we make them worse. If we treat people as they ought to be, we help them become what they are capable of becoming* (Ginott, 2003).

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A STUDY ON THE TYPE OF SCHOOL DURING THE DAWN OF MODERN EDUCATION IN BHUTAN

Introduction

This study aims to clarify the state of school education in the Bhutan during the 1940-50s, a period of dawn of the modern education in Bhutan, by classifying schools and identifying their contrasting characteristics.

The origins of modern education in Bhutan can be traced back approximately 100 years. Bhutan's modern period began in 1907 when Ugyen Wangchuck (reign: 1907-1926) became the first hereditary King and uniting the country. Then, 1914 saw the inception of modern education when 46 boys travelled oversees to study at mission school in Kalimpong, India (Tandin Wangmo & Kinga Choden,[1] 2011, p. 445). In the same year, Ugyen Dorji established Bhutan's first modern school in Haa District where teachers from the Church of Scotland Mission taught alongside a Bhutanese teacher by the name of Karp (*Ibid*). Then in the following year, another school was established in Bumthang District for educating the Crown Prince and children of the people serving in the King's court. Reportedly, by 1919-1920, 28 students were attending the school in Haa and 21 students were attending the school in Bumthang (*Ibid*). The two schools described above can be regarded as elite education institutions for the select few rather than regular schools for the general public.

Although many years passed before any further schools were established in Bhutan, several schools were constructed toward the end of the reign of the Second King, Jigme Wangchuck (rein: 1926-1952) (C. T. Dorji, 1995, p. 50). According to the Jesuit priest William Joseph Mackey, the language of instruction at these schools was Hindi and a total of between 7 and 10 primary schools were established throughout Bhutan (Mackey, 2002, p. 6). Although schools opened throughout the country during the reign of the third King, Jigme Dorji Wangchuck (reign: 1952-1972), to my knowledge, no research to date has closely examined the state of school education in the period addressed in this study. Then, an education system was established under the First Five Year Plan from 1961 as the government began to plan the expansion of school education in Bhutan. Subsequent educational developments materialised as a result of successive educational policy submissions and introductions under the Five Year Plans.

So what kind of schools existed in Bhutan during the 1940-50s prior to the introduction of the First Five Year Plan as schools for the general public began to emerge? Arguably, the answer to this question is crucial for understanding Bhutan's educational policy since the 1960s as well as its socio-economic development. This study focuses on classifying schools established in the 1940-50s into 'schools for Nepali immigrants' and 'schools for Bhutanese' and clarifying the characteristics of

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[1] Editor's: Due to the fact that there is no sharp distinction between first name and surname in Bhutanese names, they are given in their full form in both citations and references.

the state of each kind of schools at the time of its establishment and its language of instruction.

Schools for Nepali immigrants

Following the establishment of schools in Haa and Bumthang, the next districts to show signs of modern education were located in Bhutan's Southern area. In 1947, Nar Bahadur Pradhan, a prominent figure in Chargharey, Samtse District, opened up one room of his house as a classroom and, as requested by local residents, invited a teacher from India by the name of C. M. Rai to teach there (CERD, 2007, pp. 357-358). Furthermore, in 1951, a school was constructed by local residents in Nainital, Samtse District. 'Thrimpon' (chief district court official) B. K. Thapa was selected as the school's teacher in response to the requests of local residents. When it opened, the school had 12 students and the teacher was paid 24 Indian rupees per month (*Ibid*, p. 363). Schools were also constructed by residents in various villages in Samtse District in 1954, 1955 and 1958. The first head teacher of the school constructed in 1955 was an Indian man from Kalimpong by the name of Tsho Tshering Lepcha. The primary language of instruction at the school was Nepali and time was also devoted to the study of Hindi (*Ibid*, p. 342). The school constructed in Chengmari in 1958, which had 25 students and one teacher, later underwent government-funded improvements, and the school opened its doors in 1964 to 300 students as Chengmari Primary School (*Ibid*, p. 351). Furthermore, in 1955, a school was constructed in Tsirang District at which students received instruction under a Nepali teacher by the name of Barma Chari (*Ibid*, p. 609).

By 1948 at the latest, a thatched-hut school had been built in Sarpang District and there is a record which shows that a single one hour evening lesson was conducted at the school in Nepali by an Indian teacher (*Ibid*, pp. 374-375). Furthermore, records show that a school which later became Jigmeling Lower Secondary School was also operating in Sarpang District in 1957. The school was located within the grounds of a Hindu temple and the manager and owner of the temple, M. B. Pradhan, and his son managed the school and taught students by collecting an annual fee of ten Indian rupees per student (*Ibid*, p. 368). In 1961, the school was converted into a public school by the Bhutanese government. Furthermore, J. B. Pradhan established Neoli Primary School in Samdrup Jongkhar District in 1957. For many years, the school employed Indian teachers and it was not until 1984 that the first Bhutanese teacher began working there (*Ibid*, p. 311).

In 1957, a school opened in Dala, Chhukha District under the command of its first head teacher, Laxmi Prasad Sharma. The school was established in response to requests from the 'Gup' / 'Mandal' (block leader) of Tala, Karma Bahadur Chhetri, and the residents of the village (*Ibid*, p. 45). In 1960, a school opened its doors to 27 students in Sinchula, Chhukha District, under the initiative of Gup Jang Bir Raj (*Ibid*, p. 69).

Two similarities can be found between the schools described above. First, the schools were privately established, primarily in response to the strong demands of local residents. Schools were constructed by residents and a significant number of schools selected teachers according to their requests. Furthermore, to the best of my knowledge, the majority of these schools were small-scale institutions at which dozens of students were taught by one teacher. Second, the language of instruction

and the teacher's nationality were diverse. Some schools adopted Hindi as the language of instruction while some instructed students in Nepali. Moreover, recruitment extended beyond national borders as teachers from India and Nepal were invited to teach at the schools.

So why were many private schools which instructed students in Nepali and Hindi established in Bhutan's southern districts during this period? The relationship between Nepali immigrants and education can shed light on this question.

The Southern districts mentioned above are still home to a significant number of 'Lhotshampa', a term used to refer to the ethnic Nepali Bhutanese. Nepali began to immigrate to southern Bhutan in the late nineteenth and early twentieth centuries. At that time, British India imported labour, especially from eastern Nepal, to work on Darjeeling and Assam tea plantations; however, some of these workers crossed the ill-defined India-Bhutan border, eventually settling in the 'no man's land' of southern Bhutan. According to the Bhutanese government, at the beginning of the 1950s, Nepali immigration was confined to Samtse and Tsirang districts; however, in the 1950s, immigrant communities began to disperse throughout a wider area, settling in districts such as Sarpang and Samdrup Jongkhar (MoHA, 1993, p. 3).

The fact that the period in which Nepali immigrants began to settle throughout a wider area approximately coincides with the inception of school education suggests that immigrants began providing school education in areas in which they settled, following examples in their home country. On the basis of the objective fact that, at that time, Nepali communities living in villages in the south of Bhutan governed themselves with little Bhutanese involvement, it is reasonable to assume that the schools described above were not schools for Bhutanese but schools for Nepali immigrants.

These private schools were successively enhanced and transformed into public schools by the government. The first schools were transferred to the government in the early 1960s and now all schools have become public schools.

Schools for Bhutanese

In the 1950s, schools operated by Bhutanese for Bhutanese began to emerge throughout the country. All of these schools were established as public schools. In the Eastern area, a school opened in Trashigang District in 1952. According to records, the school was established under the initiative of 'Dzongpon' (district officer) Sey Dophu and Karchung with the permission of the second King (CERD, 2007, pp. 454-455, p. 458). At the time of its establishment, there were 32 students including two girls (*Ibid*, p. 455, 458). The language of instruction was Hindi and teachers by the names of Kharpha and Karma taught at the school. In 1964, Father Mackay was appointed as the head teacher of the school, which became Bhutan's first high school under the name Trashigang Central School (*Ibid*, p. 455).

In 1958, Dzongpon Tashi constructed Yurung Junior Secondary School in Pemagatshel District by order of the third King and the school opened in April of the following year with 138 students and three teachers. The languages of instruction during the school's first five years were Hindi and Choekey (classical Tibetan); however, like many other schools, the school began to instruct students in English from 1964 (*Ibid*, p. 254).

In 1959, another school was also established by Tashi, this time in Mongar District. The school grew in scale from 200 students and five teachers at the time of its establishment to 300 students and ten teachers by 1963. Although the school had only four year groups when it opened, the number of year groups was increased to ten after Father Mackay became head teacher in 1965 (*Ibid*, p. 149). According to Jigme Zangpo, one of the first students who entered the school in 1959, the school originally instructed students in Hindi before switching over to English in 1961 (Jigme Zangpo, 2002, p. 11). Students studied general subjects, Dzongkha (national language of Bhutan) and Choekey and all 200 students gathered in the lecture hall to study as a single class (*Ibid*, p. 10).

In the Central area, in 1958, a primary school with over 100 students was established in Zhemgang District (CERD, 2007, pp. 663-664). Furthermore, a school called Tongsa Junior Secondary School opened in 1959. The school instructed students in Hindi before adopting English in 1964 and courses offered were Hindi, English and Mathematics. Some female students also attended the school (*Ibid*, pp. 574-575).

In the Western area, Punakha School was constructed in the early 1950s. The languages of instruction were Hindi and Dzongkha and lessons centred on the study of the language of prayers (*Ibid*, p. 285). In 1955, Druk Gyalpo Jigme Dorji Wangchuck Higher Secondary School opened in Wangdue Phodrang District. The language of instruction was Hindi and there were 46 students when the school was established (*Ibid*, p. 623).

In Haa District, Jigme Palden Dorji, who was appointed Chief Minister in 1952 and became the first Prime Minister of Bhutan later, transformed the long-established Haa School into a modern mixed-sex institution which provided primary education under a five or six-year system (Stewart et al., 2008, p. 3). The first batch of approximately 50 students enrolled in the school in 1951. These graduates are recognized as the first students to complete primary education at a school that is open to the public in Bhutan (*Ibid*). Furthermore, the school was designated as a model school for the switch over to English instruction by the third King (CERD, 2007, p. 113) and records show that, from the 1950s, English was used as a language of instruction alongside Hindi. According to Gagay Lhamu, a student at the school, there were three teachers including the head teacher, lessons were conducted between 9:00 am and 3:30 pm every day and time was devoted to activities such as archery, dance, and athletics in addition to general subjects (Gagay Lhamu, 2002, p. 23).

In addition, from the 1950s, public schools also began to spring up in southern Bhutan where Nepali immigrants had begun to construct private schools. In 1954, Jigme Palden Dorji Secondary School was established in Tsirang District and began conducting lessons under the direction of its first head teacher, Lingden Lepcha (CERD, 2007, p. 596). Records suggest that the modern education system with English as the language of instruction was introduced at the school in 1964 (*Ibid*). Furthermore, in 1957, a school with 109 students was established in Samtse District by order of the third King (*Ibid*, p. 340).

Two major similarities between the schools described above can be found: First, schools were established under the initiative of local government officials. As far as can be ascertained, unlike schools for Nepali immigrants, none of the schools

described above were established in response to the strong wishes of local residents. Moreover, most of the public schools were comparatively large with more than 100 students in attendance when they opened. If schools for Nepali immigrants embody 'modern education which grew from the bottom up', then schools for Bhutanese can be said to represent 'modern education which spread from the top down'.

Second, with the exception of the school in Mongar District, schools generally adopted Hindi as the language of instruction until 1964. However, in addition to Hindi, some schools instructed students in Dzongkha, Choekey and English. Although it is difficult to grasp the educational content adopted by the schools at that time in detail, it is reasonable to assume that there were no common curricula and no detailed regulations except for those regarding use of Hindi as the language of instruction.

It is difficult to identify a clear reason why schools adopted Hindi as their language of instruction; however, it is possible to speculate several negative reasons for this. First, Hindi was necessary for students to continue their education. Although some of schools described above were called 'lower secondary' or 'secondary' schools, these schools generally only provided primary education throughout the 1950s and outstanding students were sent to Kalimpong to continue their studies (Singh, 1985, p. 186). Since there were no modern secondary or higher education institutions in Bhutan at that time, knowledge of Hindi was essential in order for students to continue their studies. Therefore, schools may have sought to familiarise students with Hindi by adopting it as the language of instruction from the primary school level.

Second, adopting other languages as the language of instruction was problematic. Bhutan is a multilingual country with a dispersion of many different languages. No one language holds the absolute majority and native speakers of Dzongkha account for only 30% of the population. Although, Dzongkha had a writing system—unlike the numerous other languages scattered throughout Bhutan—arguably, it lacked the vocabulary needed for teaching general subjects under a system of modern education, thus ruling it out as a language of instruction. Moreover, additional factors, such as the fact that teachers were well versed in Hindi owing to their experiences studying abroad and the fact that Indian textbooks written in Hindi were also in use at the time inevitably led to the adoption of Hindi as the language of instruction.

Conclusion

This study has analysed schools which were established in Bhutan in the 1940-50s. These schools can be summarized as follows on the basis of circumstances surrounding their establishment and language of instruction:

In terms of circumstances that led to their establishment, the results of the analysis reveal that the small-scale private schools for Nepali immigrants which emerged in Bhutan's Southern area from the late 1940s in response to the requests of local residents embody the 'bottom up growth of modern education'. Conversely, the comparatively large public schools which were established throughout Bhutan from the 1950s by local government officials under the instructions of the King can be said to represent the 'top down spread of modern education'.

In terms of the language of instruction, schools for Nepali immigrants adopted Hindi and Nepali and the majority of teachers were invited from India and Nepal to teach at the schools. On the other hand, schools for Bhutanese generally adopted Hindi as the language of instruction, but employed Bhutanese teachers with experience studying abroad rather than inviting teachers from other countries.

In this way, schools for Nepali immigrants and schools for Bhutanese have contrasting characteristics and it can be argued that such differences define the dawn of the modern education in Bhutan. Before the full-scale expansion of modern education began with the introduction of the First Five Year Plan in 1961, the foundations of school education in Bhutan had already been established to the extent described in this paper. In the 1960s, a unified school education system and curriculum were established and English was adopted as the language of instruction; however, the study shows that such changes were not achieved overnight but developed from the foundations of general school education established from the late 1940s.

First Appearance

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JERUSALEM AND ISTANBUL: JUXTAPOSING AND PERSONIFYING ANCIENT CITIES FOR A 21ST CENTURY READERSHIP

Thinking about cities requires thinking about what is or has been built in relation to what has been imagined. (McClung, 1988, p. 35)

For writers that have earned status as cultural legends like Yehuda Amichai (1924-2000) and Orham Pamuk (1952-) the respective cities where they themselves resided serve as both setting and muse. In the writings of Amichai the holy city Jerusalem assumes the role of both a backdrop for his poetry as well as an all encompassing symbol of Israel and its people. In the autobiographical and semi-autobiographical prose of Pamuk it is Istanbul, the geographical and cultural crossroads of Europe and Asia that simultaneously inspires and dictates the nature of his narrative. Both authors have been celebrated for their integration of the city as a silent, verbally if not literally, character within their works – a multifaceted player shaping and influencing at every turn. Amichai, a name long associated with Israeli nationalism, and national criticism as well as unorthodox depictions of Judaic culture is always firmly rooted in the Middle East despite his childhood in Germany. Amichai never returned to live in the west for any significant time, and would spend his final days in the city that had inspired and frustrated, motivated and vexed him. Pamuk, a controversial name in his country has relocated to America continuing to focus on the narrative of Turkey. The Turkey of Pamuk's prose finds its core in the diversity and transience of post-Ottoman Istanbul. Unlike Amichai, Pamuk embraces the non-fixity of cultural definition. With one foot in Europe and the other in Asia Istanbul lends itself ideally to themes of multiculturalism and metamorphosis. This analysis will analyze urban personification to look at the many roles of Istanbul and Jerusalem comparatively.

The use of urban personification is entirely dependant on the reader's perception and comprehension of what the city as a non-stationary reality signifies. "Literary texts sometimes state, but more often merely imply, a set of values grounded in one or the other models" (McClung, 1988, p. 35). In William McClung's article "Dialectics of Literary Cities" he discusses the characteristic phenomena evoked by the mention of specific cities and how they relate to the reading of a literary work. McClung gives examples of several North American cities, listing the images associated with them. McClung does not mention local mythology, traditions, cultural components, legends, folklore, history etc. For the North American reader McClung's approach becomes infinitely more complicated when dealing with foreign authors read in translation. Certainly the reader's previous understanding of the mythology of foreign cities is not as intimate as the readership of those within the country of origin. That being said, this makes the role played by the city as literary catalyst all the more essential.

"A history of the imagination of the city, including though not limited to literature, might begin by describing the divided sensibility that, in western thought at least, has produced the dialectic so prominent in cities of fiction: on the one hand,

ideal, objective apprehended forms, and on the other, compromised, experiential, subjective systems. The meeting of the narrative and plastic imaginations in both kinds of literary architecture – verbal cities and specialized language – is a point of departure" (McClung, 1988, p. 37).

McClung states that "literary architecture" bares the burden of formulating and sustaining the multi-layered "imagination of the city" which in a broad sense can also be seen as one component of the city's mythology.

Amichai's own personal love for the holy city is evident in all his Jerusalem poetry, but the messages he sends are often enigmatic and contradictory. To understand Jerusalem through the eyes of Yehuda Amichai is to understand the passion, confusion and disconnect that isolate this city as uniquely conflicted and sacred. "The air over Jerusalem is saturated with prayers and dreams/ like the air over industrial cities./ It's hard to breathe" (Amichai, "Ecology of Jerusalem").

Amichai's sentiments are often polarized, both reverent and blasphemous, something for which he has been criticized by Yoseph Milman among others. His evocation of Jerusalem more strongly resembles the appearance of an esteemed recurring protagonist – both virtuous and flawed.

"Amichai crafted some of his most wounded and wounding poems about what would remain his most unwavering of subjects, Jerusalem" (Omer-Sherman, 2006, p. 215). In his poem "Jerusalem is Full of Used Jews", a title that sets up the work as inflammatory, Amichai very critically condemns the endless loss of what he sees as anonymous masses sacrificed in the name of maintaining the Jewish state. This criticism should not be seen as anti-nationalist as Amichai himself fought in numerous conflicts for the land of Israel. However, his sharp tone is less focused on the condemnation of war and more centered on exactly how so many lives were lost – not why. The first stanza reads:

"Jerusalem is full of used Jews, worn out by history/ Jews second-hand, slightly damaged, at bargain prices./ And *the eye yearns toward Zion* all the time. And all the eyes/ of the living and the dead are cracked like eggs/ on the rim of the bowl, to make the city/ puff up rich and fat" (Amichai).

The "history" that Amichai refers represents the countless conflicts intertwined with Israel. When he writes that these Jews are "slightly damaged" the reader is to understand that these are the veterans of any number of wars Israel participated in – and that they have lost value as they are no longer useful to the cause. These two first lines build upon one another in intensity and culminate in the line "And *the eye yearns toward Zion* all the time" which is a quote from *Ha Tikvah* (the Hope) the national anthem of Israel. Amichai's uses this portion of the anthem in order to draw the reader's attention from the symbolic abstraction of "used Jews", and connect this image directly to a concrete representation of Israel. The reader understands that it is from this fixation with "Zion" that these nameless masses have been brought to ruin. The dramatic heightening of intensity continues to build with the final two lines of the stanza. Both the living and dead are being sacrificed for the exaltation and glory of the Jewish homeland, Jerusalem in particular.

Such provocative statements are characteristic of Amichai's style – but have not gone without harsh criticism. In "Sacrilegious Imagery in Yehuda Amichai's

Poetry" Yosheph Milman is quick to point out to *Akhshav bara'ash* saying "fleshy visions more common of pornography and the very mention of God in such a context is a form of blasphemy" (Milman, 1995, p. 112). Certainly religious references with a modern twist have the benefit of added shock value – both positively and negatively. Milman tries to make no such value judgement and does draw the reader's attention to the significance and impact of Amichai's work within the sphere of Modern Hebrew poetry, blasphemer or not: "Most critics recognize, at least in regard to the scope of traditional materials he uses, that Yehuda Amichai is one of the most outstanding of Israel's post-independence poets" (Milman, 1995, p. 102).

Amichai's use of Judaic components is intentional and designed to elicit strong responses specifically in order to highlight what he regards as particularly poignant. The sacrilegious tones have the purpose of accentuating these points not of any true "blasphemy". Omer-Sherman claims: "To the poet's lasting credit, he consistently manages this irreverent reduction without a hint of contempt for faith itself" (Omer-Sherman, 2006, p. 228). This directly contrasts the argument made by Milman.

In Amichai's "And That is Your Glory" Omer-Sherman does reiterate Milman's stressing of religious inversions saying: "In the earliest lyrics we already encounter evidence of the poet's volatile conversation with the city: this is apparent in "And That is Your Glory" with it's rueful nod to the liturgy of the Days of Awe" (Omer-Sherman, 2006, p. 217). The nature of the Days of Awe, a sober and introspective time in the Jewish calendar, is anything but "rueful". As Omer-Sherman shows this tongue-in-cheek narrative voice is intentionally provocative as the author weaves in images of Rome and Mecca alongside his great muse.

In actuality it is less spiritual and more humanitarian themes that motivate the Amichai Jerusalem works. Despite his Orthodox upbringing Amichai's sentiments are rooted in the secular, as supported by Milman. Amichai, despite his secularism and the seemingly religious criticisms of Jerusalem, maintains a constant dialog with the city.

"Jerusalem remains the poet's template of both enmity and prophecies revelations about the human condition; in his relentless staging of each, Amichai performs an eloquent deconstruction of the contemporary abasement of Jerusalem by those who strive to control her" (Omer-Sherman, 2006, p. 228).

In the poem "Jerusalem" an undefined narrator describes his surroundings in the Old City from a rooftop. He makes distinctions between himself and the many people and things around him. The narrator evokes images of white hanging laundry, a wall, and nondescript flags from both sides. Amichai's underlying theme within the image of Jerusalem – is conflict. "On a roof in the Old City/ laundry hanging in the late afternoon/ sunlight:/ the white sheet of a woman who is my/ enemy" (Amichai, "Jerusalem").

It is left to the reader to assume that the woman he calls "enemy" is Palestinian, and that her "white sheet" is an allusion to the white flag of peace. The wall then, is not a literal one, but a figurative divide between the sides of the conflict, and thus the narrator cannot see the faces of those on the other side. The idea of "enemy" carries with it an intangible quality; the people on the other side remain faceless and anonymous. Although Omer-Sherman states that "the definitive Jerusalem poem

would never be written" (Omer-Sherman, 2006, p. 217),   Amichai's simply titled "Jerusalem" would seem to encompass the physical dividedness along with psycho-emotional turmoil of the iconic city. In "Ecology of Jerusalem" Amichai deals with introverted reactions to Jerusalem and deviates from the immediate visual responses as demonstrated in "Jerusalem".

"And from time to time a new shipment of history arrives/ and the houses and towers are its packing materials./ Later these are discarded and piled up in dumps" (Amichai, "Ecology of Jerusalem").

Unlike the rooftops in "Jerusalem" the "towers and houses" in this work are intangible. Amichai's urban personification takes on the abstraction of passing time. The "new shipments of history" refers to the timeline of Israel's occupation.

"Jerusalem was the great stage where the traumas and celebrations of the Israeli psyche were enacted. In this regard, it should be emphasized that, when it came to the gushing utterances of those who claimed Jerusalem from afar or who or stayed for a brief sojourn, Amichai had little patience" (Omer-Sherman, 2006, p. 216).

Amichai's cynicism towards "history" is a rejection of foreign occupation. The "houses and towers were its packing materials" indicates what is first imposed and later falls to ruin "piled up in dumps". Amichai speaks here not of actual structures but alludes to the nature of what lies in the layered soil beneath Jerusalem. The poem ends with the stanza:

"And in enclosed gardens heavy with Jasmine/ foreign consulate/ like wicked brides that have been rejected/ lie in wait for their moment" (Amichai, "Ecology of Jerusalem").

These are not literal images but symbolic ones meant to stir the reader's contemplative intrigue through the construction of individual descriptions. The "foreign consulates" are exactly that – but this is where the literal ends. The "enclosed gardens" refer to the partitioning and dividing, while the "garden" metaphor is intended to evoke the beauty of the land. The "jasmine" although seemingly innocuous is rather the opposite – a strong smell being utilized to mask the stench of controversy, this sensual aroma is alluded to in the same way in other works as well. Finally, in an antagonistic manner, Amichai writes of the foreign bodies of government awaiting their "moment" – meaning that they too aspire to possess Jerusalem, and add yet one more layer to the history that has been "discarded and piled up in dumps".

Amichai once wrote that "In Jerusalem, everything is a symbol" (Amichai, "Jerusalem, Jerusalem, Why Jerusalem"). The multifaceted roles taken on by the city as subject and theme speak to Amichai's profound love and frustration with his muse. For Amichai the holy city was everything – both good and bad. Omer-Sherman, in the final lines of his insightful analysis says that Amichai was a: "poet who always saw Jerusalem as distinctly less than a geographic setting and more a sentiment and at times capricious participant in the disappointed but perpetually expectant humanity caught up in its story" (Omer-Sherman, 2006, p. 234).

Farther north – at the geographical and symbolic intersection of west and east – 2006 Nobel Prize winner Orham Pamuk had begun to immortalize Istanbul from his secular Muslim perspective. "Wandering the streets of Istanbul the first-person

narrator of Orhan Pamuk's autobiography, *Istanbul: Memories and the City* explores the city's darkest corners to get a sense of himself. During his last nocturnal excursion the young flaneur find his vocation as a writer, a fortunate discovery" (Laschinger, 2006, p. 102). Pamuk has been celebrated for his depictions of multiculturalism and the various eastern and western influences that have shaped modern Istanbul.

"By bringing different elements – visual, textual, literary, historical, and personal – echoes the structure of Istanbul as Orham had experienced it, thus offering the reader yet another distorting mirror. In the distorting mirror of the narrative, both Orham and Istanbul are presented as displaced identities that explore the possibilities offered by the perpetual reinvention" (Gurses, 2012, p. 59). The author admits openly how experiential his writing is – drawing from his own life in *Istanbul: Memories and the City*.

"Just as in dreams, when we read novels we are sometimes so powerfully struck by the extraordinary nature of the things we encounter that we forget where we are and envision ourselves in the midst of the imaginary events and people we are witnessing. At such times we feel that the fictional world we encounter and enjoy, is more real than the real world itself" (Pamuk, *The Naïve and the Sentimental Novelist,* p. 3).

Pamuks fictional world, the representation of Istanbul, is intended to mirror the real Istanbul. The reader is less conscious of the line Pamuk draws between fiction and reality. Gurses is correct in regarding Pamuk's work as a mirror being held up to the city. The distortions the critic refers to indicates Pamuk's role as the perceiver, interpreter and subsequent mirrorer of Istanbul.

"In its different neighbourhoods, in the predominant tones of gray, the city not only obstructs an ultimate rendering but also prevents its inhabitants from experiencing the security of such an absolute definition. Orham as well as other inhabitants of the city witness the constant displacement by seeing themselves reflected in the permanent move that the city is subject to" (Gurses, 2012, p. 59).

Pamuk brings Istanbul to life, not only in a metaphorical sense, but literally – with people, energy and change coursing through its streets like blood through arteries. The depiction is less concentrated on what the city is – but who and what it is transforming into.

"But what I am trying to describe now is not the melancholy of Istanbul but the *hüzün* in which we see ourselves reflected, the *hüzün* we absorb with pride and share as a community. To feel this *hüzün* is to see the scene, evoke the memories, in which the city itself becomes the very illustration, the very essence of *hüzün*" (Pamuk, *Istanbul: Memories and the City*, p. 94).

Pamuk indirectly refers to shared group experience – essentially the culture of those who intimately know Istanbul. He uses the word "melancholy" repeatedly in order to highlight what he clearly regards as a crucial feature of the perceived Istanbul experience shared by other long time inhabitants. It should be noted that the use of the Turkish word for melancholy, *hüzün* is a stylistic choice made by the translator, presumably in order to distinguish this abstract phenomena as something innately Turkish. But it is not an authentic *hüzün* but a reflected facsimile that is

presented to outsiders, feeding their conceptualization of Istanbul. In the subsequent pages Pamuk lists the occurrences which he relates to his muse.

"I am speaking of the evening when the sun sets early, of the fathers under the streetlamps in the back street returning home carrying plastic bags. Of the old Bosporus ferries moored to deserted stations in the middle of winter, where sleepy sailors scrub the decks pail in hand and one eye on the black-and-white television in the distance…" (Pamuk, *Istanbul: Memories and the City*, p. 94). The examples Pamuk provides cover all spectrums of society: museums, pornography theatres, street vendors, the intelligentsia. The list continues for another two pages, filled with vivid images, sensual description and countless purposeful contradictions creating the mythology of Istanbul. Unlike Amichai who engages in a dialog with his urban personification, Pamuk creates an ongoing dialog with his Istanbul readership.

Turkish identity, as he presents it, is both European and Asian. Istanbul in Pamuk's consciousness is a collision of cultural influences resulting in something truly unique. His works are saturated with the turbulent history of his country, and at all stages Pamuk regards Istanbul as having a specific cultural blend.

In his novel *Snow*, the protagonist Ka travels to the city of Kars, situated in the far eastern part of Turkey. The text deals with issues of secularism, devotion and the national Islamic narrative. Despite being set on the opposite end of Turkey, far from Istanbul, one excerpt exemplifies perfectly the collision of European values within the historically Islamic narrative of a secular country.

"According to statistics released by the American Black Muslim professor Marvin King the incidence of rape in Islamic countries where women cover themselves is so low as to be nonexistent and harassment is virtually unheard of. This is because a woman who has covered herself is making a statement. Through her choice of clothing she is saying, Don't harass me" (Pamuk, *Snow,* p. 45).

Ka makes this declaration shortly after arriving in Kars to unearth the secrets of women who have ended their lives. This highly traditional perspective is seldom present in this autobiographical and semi-autobiographical works illustrating the disagreement of societal and cultural values. "Still another possibility was the basic difference lay between East and West lay in the fact that Easterners are fatalists, resigned to what they view as 'God's will' whereas Westerners struggle relentlessly to stave off the inevitability of death" (McGaha, 2008, p. 96). McGaha takes a secular, more western approach, to resolving a clash between traditional eastern values and western aestheticism. Pamuk, in reflections on his childhood and devoutly Muslim housekeeper comments:

"To me it seemed as if it was because they were poor that God's name was always on their lips. It's entirely reasonable that I reached this false conclusion by watching the disbelief and mockery with which my family viewed anyone religious enough to pray five times a day" (Pamuk, *Istanbul: Memories and the City,* p. 179).

The contrast of perspectives is stark: most notable is the difference in tone between Kars, a city situated far in the east, and the unique multicultural secular sphere Pamuk relates to Istanbul. "My first trip to a mosque helped confirm my prejudice about religion in general, and Islam in particular" (Pamuk, *Istanbul: Memories and the City,* p. 181). The juxtaposition of rich and poor, secular and

devout is enhanced by Pamuk's following description of his initial encounter with Islamic tradition: "At Teşvikye Mosque we found a crowd of twenty or thirty people – mostly owners of small shops in the back streets or maids, cooks or janitors who worked for rich families Nişantaşi" (Pamuk, *Istanbul: Memories and the City,* pp. 181-182). Ultimately it is the narrative of Istanbul's inhabitants that concerns Pamuk – his observations and confessions are as wickedly honest as they are enchanting. This class based evaluation of devotion is an example of the juxtapositions of the city's mythology as depicted by Pamuk. The reader, Turkish or not, comes inevitably to the conclusion that understanding Orham Pamuk is understanding Istanbul – the ultimate narrative of contrasts.

For their openness to criticize religion, and secular approaches Amichai and Pamuk lend well to a comparative analysis. Both poet and novelist regard the religious components of their writing as cultural, not spiritual. Amichai saw Jerusalem as both virtuous and hateful, Pamuk regards Istanbul with appreciation and contradiction – but neither writer's name will ever be written or spoken without evoking images of their respective muses.

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THE CONCEPTS 'BENCHMARKS AND BENCHMARKING' USED IN EDUCATION PLANNING: TEACHER EDUCATION AS EXAMPLE

Introduction

Planning in education is a structured activity that includes several phases and steps that take into account several kinds of information (Steyn, Steyn, De Waal & Wolhuter, 2002: 146). One of the sets of information that are usually considered is the (so-called) 'benchmarks' and 'benchmarking' regarding the focus of a particular planning project.

Benchmarking for quality teacher education is not only an exercise of comparing teacher education in different countries in order to identify the best teacher education programmes or qualifications on different levels, for example in terms of high pass rates and/or competencies acquired by students. The qualifications, programmes and student achievements may be the core of such benchmarking exercises, but it should not be the only focus regarding benchmarking. The quality of teacher education is determined by the whole environment of teacher education and it should comply with all the other determinants of the education system in order to deliver quality teacher education.

The concepts 'benchmarks and benchmarking' is the result of a particular methodology following the sequence of identifying positive and negative lessons to be learned from different education systems, after which best practices in and for particular situations are defined that can be formulated as benchmarks and benchmarking guidelines, which informs theory that can be applied in a particular setting.

Therefore, the aim of this paper is to shortly explain the nature of planning in education, the methodology to determine benchmarks regarding a particular topic, the position of teacher education in the education system as well as the different important determinants of teacher education. The paper will concluded with some examples of international perspectives regarding benchmarking for quality in teacher education.

Strategic planning in the education system

Introduction

The establishment of an education system is a complex exercise, because insight and knowledge in terms of the theory underpinning the purpose and structure (components and elements) of the education system, as well as the requirements for the effective practical functioning thereof are essential. In order to provide the developers and planners of an education system with a basic point of departure, the following exposition of education system planning and the explanation of the steps in planning steps serve as contextualisation (Steyn & Wolhuter, 2012: 46).

The establishment of an education system may be planned according to the following framework for strategic planning which has specifically been developed for education systems. The framework for planning comprises three phases, namely the phase of planning-preparation, the phase of planning-analysis and the phase of

planning-operationalisation. Each of these phases in turn comprises various steps (Steyn, Steyn, De Waal & Wolhuter, 2002: 143). It should constantly be noted that this instrument is a framework for planning. By implication, the framework should not necessarily be strictly emulated, but the chronological order and content of steps should be adapted in order to suit the specific situation.

Phases of the strategic planning framework

The phases of the planning framework include the following steps (Steyn, Steyn, De Waal & Wolhuter, 2002: 143-164):

- **The phase of planning-preparation** comprises the following steps, namely the description of the motivation for planning, the establishment of a planning team, the discussion of the niche under consideration and the projected outcomes that should be attained.
- **The phase of planning-analysis** consists of the following steps, namely the identification of the target group and an analysis of their specific educational needs; the explanation of the purpose of the education that should be provided as well as an analysis of the different external determinants, including the demographic tendencies, the geographic and climatic aspects, the economic and technological aspects, the social, political and language trends, the relevant legal and institutional factors, the philosophical and religious trends and competitors and collaborators. The phase of planning-analysis also includes an analysis of the internal determinants that refers to the internal determinants of historical nature, the internal determinants of reciprocal nature and the internal determinants of educative nature. The SWOT-analysis, referring to the analysis of the strong- and weakpoints as well as the opportunities and threats, can be concluded from the planning analysis and forms the final part of the analysis of the determinants.
- **The phase of planning operationalisation** follows the phase of planning analysis and consists of planning the different components and elements of the particular education system. The components and elements of the education system include the following:
  - The component '**education system policy**' with elements policy formats, education aims, objectives and vision and policy making procedures.
  - The component '**education system administration**' with elements organisational management structures, financial framework and budget and internal and external communication.
  - The component '**structure for teaching**' with elements education levels, education institutions, curricula and programmes, educators, learners, language of teaching and learning and physical facilities.
  - The component '**education support services**' with the three elements, namely support services to the learners, to the educators and to the teaching-learning situation.

Benchmarking for use in the planning

In the planning process, benchmarking is important during the phase of planning analysis as well as during the phase of planning operationalisation. During the phase

of planning analysis the issue of benchmarking will particularly be in the focus during the discussion of the niche as focus of the planning and during considering the internal determinant of educative nature. In both these steps the 'generally accepted minimum criteria for a particular situation' is determined and will guide the further thinking about the topic. In the phase of planning operationalisation the 'benchmarked' situation will tend to explicitly or implicitly serve as template regarding the plans that should be made.

As stated in the introduction, benchmarking is the result of a particular methodology. This methodology follows a particular sequence, namely firstly the step of identifying lessons to be learned from different education systems, after which secondly best practices in and for particular situations are analysed and which can thirdly be formulated in benchmarks for a particular situation or context, that can be applied in a particular setting. These sequential steps can be explained as follows:

- **Lessons that can be learned**, should be identified from different education systems: The way in which a particular situation occurs in different education systems are being identified and described. However, it is not only a description of the particular situation, eg the level of teacher education, but the situation is being described in the context of the relevant external and internal determinants. From this description positive lessons, which can be followed, and negative lessons, which should be evaded, regarding the own situation that should be planned can be described.
- **Best practices** in and for particular situations: Departing from the lessons that can be learned in different applicable and relevant education systems, best practices in and for particular situations are identified, analysed, motivated and described through comparison of different examples. Thus, the best practices represent the best solutions or applications that can be identified from different situations in different education systems.
- **Benchmarks** for a particular situation or context: From the best practices, 'benchmarks' can be formulated that can serve as 'generally accepted points of departure' to find solutions for similar situations in different settings. However, it is important to remember that even benchmarks should be implemented according to the particular context.

Therefore, it is important to understand that benchmarking for teacher education will be, most probably, applied differently in Finland than in South Africa.

Examples of benchmarking guidelines regarding teacher education

Teacher education realizes particularly in the elements of the component 'structure for teaching' of the particular national education system. The following features of teacher education in the education system can be identified as the analysis of best practices in teacher education according to lessons that can be learned:

- Best practices refer to the fact that teacher education is positioned on a particular level of education provisioning, which is (usually) fully placed on the tertiary level. On this level the decisions should be about the positioning of teacher education on either the certificate level and/or diploma level and/or graduate and post-graduate level and about complying to the general requirements of these qualifications.

Lessons were learned from Japan and the Netherlands. In Japan the lowest level of certification is temporary of nature, valid for 15 years, and available to graduates of a junior college teaching program. The highest, or "advanced level", certification is available to teacher candidates who hold master's degrees. The vast majority of Japanese teachers hold at least a bachelor's degree (NIEB, 2014b). In the Netherlands teachers in primary school need to have a teaching license for primary education, which can be obtained by following a 4-year course aimed at primary education. This course is offered at a Hogeschool and covers an integrated curriculum with didactical and educational subjects in the different subject areas. Teachers in lower secondary education need to have a second-degree teaching license, which can be obtained by following a 4-year course at a teacher education for secondary education. This course covers an integrated curriculum both pedagogical and educational subjects and one subject area that has to be taught in secondary schools. Teachers in upper secondary education need to have a first-degree teaching license, which can be obtained by following a 1-year postgraduate course (1600 study hours). This course is offered at a university after finishing a four-year academic study in a (school) subject and covers both pedagogical and educational subjects. (CIEB, 2014a; Snoek & Wielenga, 2001: 13-14).

- Best practices indicate that decisions should be made regarding which education institutions will take the responsibility to provide teacher education. For example, in Ghana the initial teacher education preparation (Diploma in Basic Education) is offered in 38 public and 3 private colleges of education (Asare & Nti, 2014: 5).

- Best practices point to the fact that relevant teacher education recognised programmes and curricula should be properly developed and implemented for pre-service, in-service and post graduate education opportunities. A vast array of programmes for teacher education exists in different countries.

From the lessons to be learned, the one commonality is that these programmes link to the school pattern and to qualifications and levels provided for in higher education in the particular country. In Ghana teachers are prepared for first cycle schools (nursery, kindergarten, primary and junior high schools), second cycle schools (senior high, vocational and technical schools), and the Certificate of Education (initial teacher training institutions) (Asare & Nti, 2014: 3). In Britain the training of primary and secondary school teachers is the same, namely teachers must hold a first degree and a Postgraduate Certificate of Education awarded by a university or college of higher education. Alternatively, they must hold a Bachelor of Education (BEd) degree and have a qualified teacher status (QTS). Teachers in Germany receive their training in two stages, namely a first phase at a university and a second phase as a two year practical training at teacher seminars and selected training schools. The structure of teacher training and the contents varies in some aspects in the different *Länder* (Humboldt, 2014). Another characteristic of teacher education programmes is that, similar to the situation in Japan, continuing professional development is

required for the teaching profession and particular education programmes are planned and provided for this need (NIEB: 2014b).

- The language issues regarding teacher education should be clarified and decided on. At present, the policy in Ghana states that English should be used as the medium of instruction from primary one, with a Ghanaian language studied as a compulsory subject to the Senior Secondary School. This policy determines the use of languages in teacher education in Ghana (Asare & Nti, 2014: 4). In South Africa the majority of teacher students receive their education through the medium of English, although it is not their home language, and some teacher students are served through the Afrikaans as medium of teaching and learning.

Although an analysis and study of teacher education in a particular country will primarily focus on the elements of the component 'structure for teaching', the elements of the other components will also be affected directly. For example, the structure for teacher education should be put in policy, the required finances should be provided and particular education support services should be provided for the personnel and students involved in the teacher education.

Some determinants of quality teacher education, with reference to South Africa

Introduction

Internal and external determinants can be identified. It is important to carefully consider the different determinants in order to find lessons to be learned and to analyse best practices to understand particular situations for which benchmarking should provided. The determinants provide the benchmarking reasons for particular practices in teacher education.

Some external determinants in reference with teacher education

1) Demography

In the case of teacher education, the demography as external determinant refers to the number, settlement and movement of teachers and teacher students. Because the number of teachers is determined by the number learners, the number of teacher students will be determined by the number of learners and the number of teachers in the particular education system. For example the number of teachers on the different school levels and school subjects as well as the applicable attrition rates will determine the number of teacher students that should be recruited and enrolled in the different teacher education programmes (Mclaughling & Burnaford, 2007: 331; Nkengbeza, 2014).

2) Science and technology

The level of scientific and technological involvement of the target group of a particular education system, will determine, for example, the level of scientific and technological content in the school curriculum as well as the use of technology in teaching. For example, internationally it is the trend in the education system of the developed and developing countries to use modern communication technology in education. Therefore, these contents are included in their teacher education programmes and technology is actively used in teacher education programmes.

Distance education is also becoming a general trend in several education systems (Townsend & Bates, 2007: 21; Jansen, 2007: 25).

3) Language

The language of learning and teaching and the language competencies are very important aspects that determine the quality of education achievements. The teachers and students should have sufficient competencies in the language(s) of teaching and learning. In all education systems special measures are in place regarding the applicable languages for teaching and learning. In the majority of developing education systems, the local or home languages are not used for teaching and learning, but an European language are usually used. This affects the quality of teacher education in the sense, for example, of duration of programmes and the success ratios of students. In Cameroon, for example, because of the use of English and French in the economy and in the 'learned society' the only languages of teaching and learning in the universities are either English or French and students have to choose universities according to their competencies in either English or French. However, in the majority of developed countries the language of teaching and learning is the home language of the majority of students (Nkengbeza, 2014). This contributes directly to the level of success in teacher education in different countries.

4) Political and institutional tendencies

The political and institutional tendencies refer to the influence of government and other political institutions and groups on the nature and content of teacher education. As major actors in education provisioning, it is obvious that the education of teachers will include particular aspects to equip them with relevant competencies in order to support the development of balanced citizens in schools. The involvement of government and other political organisations is typical of all national education systems in the world and is differently managed in different education systems (Jansen, 2007: 27-29; Reid, Brain & Boyes, 2007: 79).

Internal determinants

The internal determinants refer to the aspects within the education system that determine the nature and functioning of that particular education system. The following internal determinants can be identified, namely the internal determinants of educative nature, the internal determinants of historical nature and the internal determinants of interactive nature.

1) The internal determinants of educative nature

The internal determinants of educative nature refer to the relevant educational theory, as **benchmarks**, that should guide teacher education and the relevant practise in other education systems from which lessons can be learned. The following is examples of some of the theoretical proposals regarding guidelines for quality in education (Townsend & Bates, 2007: 5; Newby, 2007: 116-119; Angus, 2007: 141; Greenberg, 2010: 20):

- Teacher education should include the concrete findings of the best research in education and a rich academic foundation of the fundamentals required in education.
- External quality assurance bodies are established to ensure quality in teacher education.

- The theoretical and conceptual base of teacher education should be consistent with beliefs and evidence about what makes a good teacher.
- Teacher education programmes usually include the so-called academic studies that is devoted to an advanced study of selected school subjects; professional studies that are intended to give the students a thorough grounding in the principles and practice of teaching and practice-teaching that constitutes the practical part of the teacher education course.
- A shift occurs in teaching namely the change in educational focus from teaching to learning and this focus should be reflected in teacher education.

2) The internal determinants of historical nature

When planning a renewal or the maintenance of teacher education in a particular education system, the present situation and past experiences of teacher education system should be analysed and described. New developments should be built on these by recognising the present capacity and how the present structure come around in order to make sure that teacher education developed towards a commonly agreed-upon future and not working in a circle exercise of development.

3) The internal determinants of interactive nature

The third type of the internal determinants is the internal of interactive nature. In this case the planning or maintenance of one aspect of teacher education in the education system, will have an effect on (usually) more than one of the other elements regarding teacher education. This is a determinant that is often forgotten and the focus is completely put on the particular aspect or element that is under scrutiny.

Some benchmarks for quality teacher education

From the exposition above it is clear that it is not easy, not even possible to benchmark teacher education in all the different aspects thereof. The following can be explained as some of the results of such benchmarking exercises:

- Teacher education is part of higher education.
- Differentiated qualifications are provided for the education of teachers in order to assist students to prepare themselves to teach in the different levels and specialisations of school education.
- Different types of teacher education institutions exist for the delivering the different types of teacher education programmes and qualifications.
- Differentiated programmes exist for the education of teachers regarding the different school levels and school specialisations.
- The theoretical and conceptual base of teacher education should be consistent with beliefs and evidence about what makes a good teacher.
- Teacher education programmes usually include the so-called academic studies, professional studies and practice-teaching.
- A shift occurs in teaching namely the change in educational focus from teaching to learning and that the modern communication technologies should be incorporated as need required.
- Continuing professional development is required for the teaching profession and particular education programmes are planned and provided to satisfy these needs.

- The language of teaching and learning and the languages learned as subjects in teacher education should be applicable to the challenges at school level.
- The government and other political organisation should make sure that their involvement in education is always for the sake of education and to ensure quality education.

Summary

In this paper the methodology to identify relevant international guidelines or benchmarks regarding the teacher education is provided. It was also explained that international benchmarking is only one of the relevant issues to be considered. Other important aspects to ensure the quality of teacher education is the education system as such, the structure of teaching, the linkage of teacher education to the schools of the particular education system as well as the different external and internal determinants of teacher education in the particular country.

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UNDERSTANDING POLICY INTENTIONS IS CRITICAL FOR SUCCESSFUL POLICY IMPLEMENTATION WITHIN THE TECHNICAL AND VOCATIONAL EDUCATION AND TRAINING COLLEGE'S SECTOR

Abstract

Public policy implementation is frequently regarded as problematic globally and reasons for these vary. In particular, the Technical and Vocational Education and Training (TVET) sector has been criticized for lack of delivery and most of the criticism is directed towards the non-implementation of government policy. In South Africa managers of TVET colleges are at the forefront of this process. Practices at these colleges could thus be interpreted in the context of management practices. Moyo (2008) suggests that the success or failure of policy could at least partly be attributed to the role that policy implementers play.

South African policies are regarded as among the best in the world, however their implementation is still a challenge. Capacity of policy implementers and their understanding of policy intentions are critical for successful policy implementation. Capacity involves the ability of implementers to identify, eliminate and obviate policy implementation challenges and their understanding and knowledge to support decision making during policy implementation. This paper interrogated the understanding of policy originators and implementers of TVET policies and found that both these respondents had a common understanding of policy intentions. In addition it was found from respondents that the capacity to take decision is critical for policy implementation.

This paper concludes that policy implementation is dependent on developed policy and capacity to take decisions. It is important for college mangers to both understand policy intentions as well as have the capacity to take decisions if policy implementation is the goal.

Key words: policy implementation, policy intentions, TVET college, college
            management, understanding policy, transformation

Introduction

Since 1994 South Africa has developed numerous legislative documents to spearhead transformation of its society. These include the *National Education Policy Act* (27 of 1996); *South African Schools Act* (84 of 1996); *the Constitution* (Act 108 of 1996); the Further *Education and Training Act* (98 of 1998) all attest to this. These point to a clear transformation agenda of the economic and social systems of South Africa. At its 2007 Polokwane Conference the African National Congress (ANC) recommitted the government to this agenda and education was one of the five critical areas identified. In his 2010 State of the Address President Zuma emphasized the importance of implementing government education policies (RSA, 2010).

The Technical and Vocational Education and Training (TVET) college sector in South Africa has been subjected to reforms since the dawn of democracy in 1994

and the release of the *Education White Paper 4* in 1998 started this process and the latest one is the *White Paper for Post-School Education and Training* introduced in 2014 (Department of Higher Education and Training, 2014). The intention of government by these reforms is to transform the college sector into a vibrant, high-quality and responsive system that will spearhead human resources development in South Africa. Despite these endeavors, the sector has continued to experience challenges ranging from curriculum reforms to finances, from learner throughputs to leadership and partnerships and they are all underpinned by policy imperatives that drive the transformation within this sector (McGrath, 1998; RSA, 1998a). In an attempt to address challenges facing the TVET college sector, in 2009 the Ministry of Higher Education and Training (MoHET) located the competency of TVET colleges under its wing.

This paper attempts to show that for transformation of the college sector to be successful, there should firstly be sound implementable policies juxtaposed with capacity at all levels to implement them.

Policy implementation

Policy documents such as The Green Paper on Further Education and Training [1] (RSA, 1998a); the White Paper 4 (RSA, 1998b); the Further Education and Training Act (98 of 1998) and the Further Education and Training College's Act (16 of 2006) were developed to drive transformation of the college sector. The development of these policies set in motion the process of transforming the college sector. Many authors (Jansen, 2001; Lungu, 2001; Pandor, 2001) praise these policies as some of the best policies in the world. Sebele (2013) argues that developed and implemented policies should drive transformation, however studies refuted this and policy implementation remains a challenge (Makinde, 2005; CEPD, 2002; Jansen, 2001).

Roh (2012), Landsberg (2009), Sultana (2008) indicate that policy implementation is a complex process and this complexity is exacerbated when implementers struggle to understand intentions and plan accordingly. Makinde (2005) indicates that there are basic critical factors that are very crucial to implementing public policy which can alleviate implementation problems. Furthermore Roberts-Gray, Gingiss and Boerm (2007) define policy implementation as the ''bridge'' between a program and its impact on those it is intended for. They argue that no matter how effective policy development is, policy cannot produce its intended benefits until it is effectively integrated into actual procedures and practices at the site of implementation. Converting policy intentions into plans requires the understanding and knowledge of both policy intentions and policy implementation. Capacity is required capacity to implement government policies and this is a key element for the transformation process in South Africa.

Capacity in policy implementation concerns use of knowledge, advising, making intelligent choices, but more concerned with the ability of governments to make intelligent choices (Painter & Pierre, 2005; Parsons 2004). Painter and Pierre (2005) have questioned the ability of governments to ensure an appropriate flow of information, analysis and advice to decision-makers particularly around issues of policy implementation and delivery on one level, and whether on the other level the

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[1] In South Africa prior 2013 TVET was referred to as Further Education and Training.

public service has the requisite expertise, knowledge, skills and resources to support decision-making (Bakvis & Aucoin, 2005; Tiernan, 2006). In this regard Barzelay and Shvets (2006) profiled a capacitated manager as someone who is 'both technically competent and adept at interacting effectively across organizational boundaries'. A capacitated manager is driven by results and has the ability to identify and eliminate potential problems and mostly solve problems without elevating them to higher levels. A capacitated manager is policy results-driven and has the ability to identify, eliminate and obviate policy implementation challenges.

The success or failure of policy implementation is directly linked to the capacity and ability of policy implementers. Once policy has been developed and adopted for implementation, policy implementers need to develop college implementation plans based on policy intentions. According to the Education White Paper 4 (1998) there was dearth of capacity at the old technical colleges (RSA, 1998b) and this resulted in many TVET colleges faces challenges in implementing the new agenda. Successful transformation of the college sector depends largely on the **policies** that are initiated and developed by government and the **capacity** and knowledge of implementers to implement those policies at college level. A mathematical equation will show this as:

Policy Implementation (PI) = developed policies (dp) + management capacity (mc).

The equation above shows that developed policies and management capacity impact policy implementation directly. I indicated above that South African policies have been touted as some of the best in the world. This paper explores how capacity to implement policy influences policy implementation at TVET colleges in South Africa that this paper is focused.

Research methodology

The study upon which this paper is based employed a qualitative research design using ethnographic interviews to collect data from seven purposefully selected respondents (Maxwell, 2009). The respondents are experts in policy origination and implementation. Two interview schedules were prepared and were constituted by questions selected in advance and extracted directly TVET policy documents.

The questions sought to solicit the understanding of key policy concepts and intentions from the informants (Flick, 2014). A portable audio recorder was used to record the interviews, which were more of discussions with the informants. Provision was made in each interview schedule for interview questions and comments. Probes characterized each interview to clarify certain responses in order to collect comprehensive data.

To enhance the credibility and trustworthiness of the study several strategies were used to analyze the collected data (Nieuwenhuis, 2006). Firstly, individual interview cases were summarized immediately after each interview. Afterwards each interview was transcribed, followed by another summary capturing key text passages to aid analysis. The last strategy involved identifying similarities and differences of content among all or some of the interviews. Codes were developed and allocated to phrases and concepts identified as similar using hermeneutics and content analysis to make meaning of textual data. The content was either a word or a

phrase or a paragraph that was used by the informants. It was important to understand the transcribed interview texts to get a clearer or better understanding of the informants' meaning of the phenomenon under investigation. The codes were used to look at data from different angles in order to be able to understand and interpret the raw data, and make inferences in an objective and systematic manner in order to identify specified characteristics of a message (Babbie & Mouton, 2004).

Certain characteristics of coded data revealed themes there were emerging from analyzed data and these themes were then analyzed. According to Harding (2013) thematic analysis focuses on identifiable themes and patterns of behavior of informants. This involved sifting and sorting through pieces of data to detect and interpret thematic categorization, search for inconsistencies and contradictions, and generate conclusions about what is happening and why in policy implementation. The process of building themes continued until there was no more possibility of new themes or categories emerging from the data.

Finally the themes were interpreted as they provided an explanation of policy implementation (Nieuwenhuis, 2006; McMillan & Schumacher, 1997). Both first- and second-order interpretation approaches were used. According to Neuman (2003) first-order interpretation is attached to an event, behaviour or action by the informant. First-order interpretations are meanings attached by the informant or informants. Second-order interpretation was carried by the researcher to try and understand the interpretations as presented by the informants and attached his meanings to them and the method of comparative analysis was used for this purpose. Interpretations or meanings of individual informant were compared with perceived meanings of other informants and then finally the researcher reconstructed the interpretations of the first order. These interpretations helped the study to make conclusions about the research topic.

Findings

This paper sought to show how the understanding of policy intentions and management capacity impacts policy implementation. The understanding of policy originators and policy implementers of the TVET policy intentions was found to be common. The study upon which this paper is based found no major contradictions amongst the respondents with regards policy intentions. The study established that the policy development process is rigorous process and yield good policies with clear intentions that are understood by both policy originators and implementers. The findings reveal that managers at college level have an understanding and knowledge of government transformation agenda captured in TVET policies and are competent to interact with government policy; although policy originators also felt that college managers lack management skills to implement policy.

Policy originators and implementers agreed that policy implementation is guided by authority to make decisions. They indicated that it is desirable that key policy implementation decisions need to be taken at different levels if effectiveness and efficiency are the guiding principles. Policy originators indicated that policy implementation decisions at central level enables the Department of Higher Education to put control measures on the college environment to ensure that colleges address national needs and goals. In this regard decisions such as determining

national priorities that TVET colleges should implement should be centralized at national level.

In addition policy originators argued that centralized policy implementation decisions ensures that colleges as well as other levels of the department account to some top level authority. Policy and policy priorities are the prerogative of the national Department of Education and in terms of the Constitution of the Republic of South Africa; TVET colleges are the implementer of this policy priorities. Colleges should plan for implementation and report its progress in this regard to DHET. A centralized policy implementation decision ensures that work is done and done according to the centrally developed plan.

In addition policy originators felt that although centralized implementation decisions are important, policy implementers need to be afforded opportunities to make decisions that affect their colleges directly. They also expressed the feeling that the type colleges should not turned into slaves that work on the master's decisions but rather should take implementation decisions at their levels. In this regard policy originators expressed that this is likely to ensure successful implementation of national policies at a sites of implementation.

Policy implementers indicated felt they have capacity and know-how to implement policy and expressed the need for them to be afforded increased decision-making authority for this purpose. These policy implementers felt that colleges are meant to serve their communities and therefore their plans should reflect and address community needs and this is not possible if implementation decisions are taken at another level. Policy implementers felt that if decisions are taken at a level that is removed from the communities, then it becomes very difficult to implement policies that seek to address their needs and demands.

Policy originators also felt that for policy to be successfully implemented at TVET colleges, colleges managers needed to be capacitated. They indicated that capacity building programs and workshops should be organized for policy implementers as these will ensure that managers implement national policy from an informed background.

Conclusion

The transformation agenda for the TVET college sector should be driven by the implementation of government policy intentions. Role players should understand government policy intentions as captured in policy documents so that they can understand clearly the intentions of policy and develop and implement plans accordingly as this is critical for successful policy implementation.

This paper concludes that policy implementation decisions are important and implementers should be given power to take decisions at the site of implementation to ensure relevance to community needs.

There is a need to decentralize power to implementation sites so that implementation decisions can be taken at this level.

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THE QUALITY OF GYMNASIUM EDUCATION IN THE BANAL CROATIA IN THE ERA OF NEOABSOLUTISM (1854 – 1860)

Abstract

The goal of this paper is to present an attempt to increase the quality of education in the Banal Croatia by analysing the reports sent to the Ministry of Religion and Education in Vienna by secondary school supervisor for the Banal Croatia Anton Jarc as well as the existing scholarly literature. The mentioned attempt was based on a reform of the education system which was initiated by the government in Vienna as early as 1848, but its provisions were finalized only in 1854. The paper depicts the efforts to implement this reform in the gymnasiums on the territory of the Banal Croatia in the context of said provisions. Special emphasis is placed on the provision that introduced German as the language of instruction in the higher grades of the gymnasiums, the activity of the teaching staff, and efforts to improve the available teaching aids and library funds. All three elements were envisioned as forming the groundwork for a higher quality gymnasium education, which would serve as preparation for further education at a university.

Introduction

There were six gymnasiums in the Banal Croatia in the 1854-1860 period; four higher gymnasiums with eight grades and two lower gymnasiums with four grades. The higher gymnasiums were located in Zagreb, Osijek, Varaždin, and Rijeka, while the lower ones were in Požega and Karlovac. They operated on the basis of a liberal reform of the education system (Švoger, 2012, pp. 311-315), which was supposed to transform the gymnasiums into general education schools, which would serve as a solid groundwork for a university education. The provisions related to the reform were enacted on 9 December 1854 (Gross, 1985, pp. 304-305; Meister, 1963, p. 85). Since not all students planned to achieve further education, lower gymnasiums were supposed to either prepare the students for further education at a higher gymnasium, or for a practical vocation (Kr. Hrv.-slav.-dalm. zem. vlada, 1896, p. 234; Čop, 1988, p. 93).

According to an order issued on 22 August 1854, the language of instruction at higher grades in gymnasiums was "predominantly" German, which was then gradually introduced into all grades (Gross, 1985, p. 317; Šidak, 1981, p. 196). In practice, this meant that, starting in the academic year 1854/1855, all classes in the Banal Croatia from the fourth grade upwards were held in German, save for Croatian Language and Religious Education (Kr. Hrv.-slav.-dalm. zem. vlada, 1896, p. 234). The introduction of German as the language of instruction was justified on the grounds that a vast amount of scholarly and scientific literature was written in German, and only by using this literature could a modern education be achieved. In addition, German was presented as the only language (apart from Italian) which has already been adapted to modern science, and it was also stressed that all educated individuals in a powerful empire such as the Habsburg Monarchy should be taught to understand each other. Finally, it was claimed that there were neither enough

competent local teachers to implement the new gymnasium program in Croatia nor enough appropriate books written in Croatian, so teachers from the other parts of the Monarchy were invited to work in Croatia. Since they did not speak Croatian, they had to hold classes in German (Gross, 1985, p. 313; Lentze, 1962, p.189; Čop, 1988, pp. 94-95). Therefore, the introduction of German was primarily intended to secure a higher quality education based on scholarly and scientific literature, which was supposed to be available not only to teachers, but also to students. This necessarily led to an increase in the quality of education since the students now had an opportunity to better reflect on what they were being taught.

However, according to the policy of the Ministry of Religion and Education, the introduction of German was not the only condition for securing a better gymnasium education. It also depended on the qualifications and commitment of the teaching staff, who were therefore obliged to attend a three-year study programme with strict exams. Special commissions for the examination of gymnasium teacher candidates were formed, first at the universities in Vienna and Prague, and later also at other universities. This allowed for a relatively high level of professional education of the teaching cadres (Gross, 1985, p. 307; Kr. Hrv.-slav.-dalm. zem. vlada, 1896, p. 235). Apart from this, the extant system where one teacher would teach one class was replaced with a system where one teacher taught a certain group of subjects. New teaching methods were also approved. Finally, efforts were made to introduce the principles of object-lessons and experiments into natural science classes, which gained an important position in the curriculum at that time (Lentze, 1962, pp. 191-192; Potrebica, 1994, pp. 124, 310), with the goal of making the subject matter more accessible to the students. Since it was determined that object-lessons were particularly important for teaching biology and physics in the lower gymnasiums while history classes (to which geography classes were linked) should focus on biographies, it became necessary to increase the number and variety of teaching aids, especially gymnasium libraries and materials related to biology, physics, and chemistry (Kr. Hrv.-slav.-dalm. zem. vlada, 1896, p. 233).

Attempts to improve gymnasium education quality in the Banal Croatia

According to the reports of Anton Jarc (Jarz), the secondary school supervisor in the Banal Croatia, the German language received an extremely important position in the Banal Croatia. This was in accordance with the state policy, which was involved in the education system through the introduction of German as the language of instruction in all gymnasiums throughout the Habsburg Monarchy. Already in his first report, Jarc claimed that the introduction of the German language guaranteed the improvement of the quality of gymnasiums in the Banal Croatia, which was, according to him, visible in the results shown in certain school subjects. However, he also admitted that some Croatian gymnasiums, more precisely those in Rijeka and Varaždin, would require some time to reach the level of the more established ones, such as those in Zagreb and Osijek. He believed this could be achieved only once the provision on the introduction of German as the language of instruction has been fully implemented in those gymnasiums, and once competent teachers and the necessary teaching aids had been introduced. According to his claims, the introduction of German as the "predominant" language of instruction in the higher grades of gymnasiums had finally ended the uncertainty and hesitancy in

artistic expression and the descriptions of scientific theories, which was best seen in the gymnasiums in Zagreb, Osijek, and Karlovac, where the youth was already fairly proficient in German (HR-HDA-71, 19/103v-103r). This was also supposed to mean that the quality of education had improved, since lessons became clearer and more understandable to the students. It is for this reason that Jarc expressed hope that the situation in the other three gymnasiums where the students were still having trouble coming to grips with the new language, i.e. the ones in Varaždin, Rijeka, and Požega, would also improve and reach the desired level (HR-HDA-71, 19/104v).

It can therefore be seen from Jarc's first report that the quality of education was the best at the gymnasium in Zagreb, followed by the one in Osijek, primarily because the students there knew German, while the other gymnasiums were marked as being of lower quality despite the successful implementation of the new curriculum (HR-HDA-71, 19/194r).

The reports show that the quality of education depended not only on the German language, but also on the teaching staff. He generally had no reservations about the quality of the teachers themselves. For the most part, he praised the teaching staff for its knowledge, diligence and collegiality, and credited them with improving the quality of education and the overcoming of various difficulties which had arisen while they were performing their duties. This positively influenced the students, who were inspired by their teachers to work diligently, and which in turn influenced the success and improved quality of the classes in general. He mentioned only one unconscientious teacher. The man in question was Johann Mihaljević, a religious education teacher at the lower grades of the Osijek gymnasium, who was not committed to his work and thus negatively influenced the students (HR-HDA-71, 19/194v, 271v, 322v). Among the teachers he lauded was Dr. Josef Roman Lorenz from the gymnasium in Rijeka, who distinguished himself by using new pedagogical methods. He introduced the usage of a natural history collection in natural history and physics classes, basing his lessons on this (HR-HDA-71, 19/263v). The barriers to having uninterrupted higher quality classes included illnesses among the teachers (HR-HDA-71, 19/104r). In these cases the teachers were substituted by their colleagues, who were however not as proficient in the same subjects, which led to a reduction in the quality of classes. Another often-mentioned problem was the lack of qualified teachers at certain gymnasiums, such as the one in Karlovac, where the students' knowledge of natural sciences was evaluated as very poor, which was partly the result of the lack of teaching staff (HR-HDA-71, 19/109r). However, a further impediment was the fact that certain teachers were overloaded with work, which happened because they had to stand in for their colleagues, or when parallel forms were introduced and became their responsibility.

In almost all of his reports Jarc provided data on the expansion of teaching aid and library collections, sorted by year and gymnasium. This was extremely important since these collections were one of the key elements for the organization of higher-quality education. For example, he noted that the lower quality of education in the Varaždin gymnasium was partly due to a lack of necessary teaching aids or a students' library (HR-HDA-71, 19/108r). He noted a similar problem in the Karlovac gymnasium, where knowledge of natural history subjects was assessed as being very poor, which was ascribed to a lack of advanced teaching aids (HR-HDA-71, 19/109r).

Jarc's reports stressed that the improvement in education quality was also the result of strict discipline, which was strengthened through the introduction of so-called grade certificates. These were usually sent once per semester to the students' parents or guardians, informing them of their moral behaviour and scholarly accomplishments (HR-HDA-71, 19/111v). The aim of these certificates was to inspire the students to be more diligent and devoted in their studies.

The reports show that the main actors of the education policy were aware that the quality of the education also depends on the previous knowledge of the students, which they brought to the gymnasiums from primary schools (HR-HDA-71, 19/105r/106v), and the willingness of the community to invest in education (HR-HDA-71, 19/112v-112r). Namely, gymnasiums were financed by municipalities and Land foundations, so they often had financial difficulties (Gross, 1985, p. 311; Cuvaj, 1910, pp. 222-223) and were dependant on the financial capacity of the students themselves, some of whom were unable to afford even the most basic books, and all of whom were required to pay a tuition fee of 8 forints and 40 kreutzers (Kr. Hrv.-slav.-dalm. zem. vlada, 1896, p. 234).

Conclusion

It is clear from the reports of secondary school supervisor in the Banal Croatia Anton Jarc that efforts were made to implement all the reforms envisioned by law in order to ensure a higher quality of education in Croatian gymnasiums: the German language was introduced, teachers took strict exams upon the completion of which they became experts for their group of subjects, and teaching aids and library funds were expanded. However, all of this did not guarantee the improvement of the quality of education. Namely, the rapid introduction of German as the language of instruction in the higher grades of Croatian gymnasiums without any significant prior student training had adverse results. Jarc first reported on the good progress of the German language in Croatian gymnasiums, but already in the academic year 1856/1857 he had to admit that classes held in German posed a problem in gymnasiums where it was not in use outside class, i.e. primarily in Rijeka, Varaždin, and Požega, (HR-HDA-71, 19/271v-271r) but it appears the situation was not much better in Zagreb and Osijek. In the end, it seems that professors first had to translate unknown words and terms, sometimes even entire texts into Croatian (or Italian in the case of Rijeka) before classes could be held – if there was even time for that (Gross, 1985, pp. 318-321). Therefore, instead of helping students to improve their cognitive abilities and reflect on the subjects they were being taught, the German language became a very limiting factor and actually cancelled all positive developments introduced by the educational reform. The character of the gymnasiums remained relatively unchanged compared to before the reforms – classes remained predominantly verbal and the students had to learn by rote (Potrebica, 1994, p. 126). However, great progress was made concerning the teaching staff, since it was at this time that the Croatian intellectual elite was created. Namely, this elite was mostly comprised of highly educated and distinguished professors who began their careers precisely in the age of neoabsolutism (Gross, 1985, p. 307).

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Part 2

Pre-Service and In-Service Teacher Training & Learning and Teaching Styles

KLARA SKUBIC ERMENC & NATAŠA VUJISIĆ-ŽIVKOVIĆ

COMPETENCE-BASED APPROACH IN THE EDUCATION OF PEDAGOGUES – COMPARATIVE VIEW

Abstract

The paper presents some of the findings of a comparative qualitative study conducted at University of Ljubljana, Slovenia and University of Belgrade, Serbia. It discusses the findings related to the opinions and experiences of the university professors about the role of competences in the pedagogy study programmes. Competence-based approach has been introduced with the Bologna process and raised many dilemmas and controversies among the university teaching staff. Many respondents are critical about the mainstream competence discourse, and associate it with narrow behaviouristic concept. They however express the stance that holistically conceptualized competence-approach could positively influence the students' ability to use theoretical knowledge and research skills when dealing with complex occupational challenges.

Key words: competences, pedagogy, teacher education, pedagogue education, Bologna process

Introduction

Departments of pedagogy and andragogy at universities in Ljubljana and Belgrade follow their more than century old tradition in the education of prospective pedagogues. The study of pedagogy is widespread in most of the Continental European countries, and is associated with the education of pedagogical professionals, i.e. professionals who in different educational organizations (typically schools, kindergartens) and other professional environments (such as pedagogical institutes, ministries) support teachers in their pedagogical activities, help students, develop new pedagogical models, or work on educational policy issues (more on that Ermenc et al., 2013; Spasenović et al., 2010).

Pedagogy is considered a fundamental science, yet not solely theoretical science which develops generally valid theories and explains general laws in the area of education, but also an applied and normative science which forms practical guidelines and defines good pedagogical practices (Biesta, 2011; Ermenc et al., 2013; Medveš, 2010). Such dual nature of pedagogy has always raised many

questions also in the area of education of prospective pedagogues. These debates have spurred in the last decade with the introduction of the Bologna model. Participating in the Bologna process, both countries underwent considerable reforms of their higher education systems, including the introduction of the competence- and learning outcomes-based approaches.

The paper draws on the comparative qualitative study which was conducted in November and December 2014 in the leading Slovenian and Serbian universities, University of Ljubljana and University of Belgrade. The paper discusses the opinions and experiences of the university professors about the role of competences in the pedagogy study programmes.

Competences in teacher and pedagogue education

The concept of competence-based approach in education has been a topic of numerous studies and heated debates (Laval, 2005; Štefanc, 2006). In Slovenia and Serbia the issue has been often related to the question of initial teacher education and training and teacher professional development (Cvetek, 2004; Korać, 2012; Marinković & Kundačina, 2012; Muršak, Javrh & Kalin, 2011; Peklaj, 2006; Peklaj et al., 2009; Plevnik, 2005; Razdevšek Pučko, 2004; Stojanović, 2008; Vranješević & Vujisiić, 2013). Many of the researchers support the idea that modern teacher education and teacher professional development need to be based on competences, as they are supposed to help re-direct the focus of teacher education to the development of practical skills (Razdevšek Pučko, 2004, p. 71), and skills that enable teachers to keep pace with constantly changing circumstances (Buchberger, Campos, Kallos & Stephenson, 2000; Peklaj et al., 2009, p. 9).

Supported by European financial mechanisms, many applicative projects have been set up to deal with the concept of competence in teacher education. Many of them have produced lists of teachers' competences, which are supposed to serve as the basis for teacher education. For instance, in such a project at University of Ljubljana (Peklaj et al., 2009), researchers identified 39 competences. They have grouped them into five categories, or five "core competence areas" (Peklaj, 2009, pp. 15-16): (a) effective teaching (includes competences such as the command of the subject; lesson planning, implementing and evaluating; the use of interactive teaching methods and didactic strategies etc.); (b) life-long learning (the use of different strategies for increasing student motivation; the development of ICT literacy; the development of communication and social skills; psychological resilience etc.); (c) leadership and communication (the creation of disciplinary guidelines, based on mutual respect; the creation of encouraging learning environment; equal support of all students; the identification of students with special needs; successful coping with conflicts and violence etc.); (d) formative and summative assessment (the appropriate usage of different modes of learning outcomes assessment; the ability to provide constructive feed-back; formulation of the assessment criteria etc.); and (e) wider professional competences (such as the ability to work in teams; being open to cultural differences; paying regard to ethical principles).

The question arises if "list-of-competences" approach, which focuses on teacher's behaviour (*techne*), can produce teachers who are able to make theoretically and morally sound decisions and act accordingly. Kroflič (2007) argues

that successful teacher education cannot be assured by listing competence, no matter how detailed such a list may be. On the contrary, drawing on authors such as Carr, Korthagen and Csikszentmihalyi, Kroflič (2007) argues that we have to focus on teachers' personal attitude in pedagogical relationships, and think about the attitude in terms of arreatic virtues such as honesty, equity, modesty, courage, empathy and other virtues of character. Arreatic virtues are about teachers' attitude toward students and pedagogical process, and both need to be based in the layer of teachers' personal mission, identity and fundamental beliefs. Students can be brought up as ethical beings only through relationship with other people. Therefore teacher education has to be based on Aristotel's concept of *phronesis*, concludes Kroflič.

Many definitions of competences exist. Widespread is the DeSeCo's definition of competences, which says that "A competence is defined as the ability to successfully meet complex *demands* in a particular *context* through the mobilization of psychosocial prerequisites" (Rychen & Salganik, 2003, p. 43, the authors' emphases), and continues: "The primary focus is on the results the individual achieves through an action, choice, or way of behaving, with respect to the demands, for instance, related to a *particular professional position* […]" (Rychen & Salganik, 2003, p. 43, the authors' emphasis). This definition implies that educational programmes – if they are to be competence-based – need to be based on a clear explication of 'professional positions' for which they are designed for. This may not be such a difficult task when one has a teacher's profile in mind. The issue becomes more complex and controversial when a professional profile of a pedagogue is in question. In the territory of former Yugoslavia, the profile of a pedagogue has historically changed considerably and even today there is no wider consensus on its nature. There is however one characteristic which is typical for the majority of programmes in the whole territory: ever since 1970s when the school counselling services in schools and kindergartens were introduced[1], their introduction has had a crucial effect on the study of pedagogy. The profile of a (pre)school pedagogue decisively influenced the formation of pedagogy study (Medveš, 2010, p. 104).

In spite of the fact that the profile of school pedagogue influenced the study of pedagogy considerably, an equation between the study and the profile cannot be made. A comparative study on study programmes in Belgrade in Ljubljana universities (Spasenović & Ermenc, 2014) revealed that the programmes are still conceptualized in a much broader manner, giving more focus to the study of science than to the training of future (pre)school pedagogues and other professionals in the educational field. Competence-based approach is reflected in the programmes, but not very pronounced. The profile of (pre)school pedagogue has remained the central focus of the programmes, but also other professional position have been taken into consideration, those related to posts in administration, leadership and research. Since the above-cited study was limited to the analysis and the comparison of organization and structure of the programmes, their general goals, and the types of educational activities, these conclusions are less reliable, which is why we have studied them further.

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[1] In the territory of former Yugoslavia elementary, secondary schools and kindergartens employ (pre)school pedagogues or (pre)school counsellors whose task is to support teachers, principals, and students.

Method

The aim of the empirical research was to examine the opinions of university teachers at the Departments of Pedagogy and Andragogy at Ljubljana and Belgrade universities on the competence-based approach which was introduced within the framework of the Bologna process. We asked them how they understand the approach, how they evaluate it, and how it influences their work.

We have conducted a qualitative comparative study, and chosen a technique of research interview (Kvale & Brinkmann, 2015). The sample includes eleven teachers, six from the Department of Pedagogy and Andragogy at the University of Ljubljana[2] (who lecture History of education, Theory of education, Sociology of education, Didactics (2 professors), Vocational pedagogy), and five from the Department of Pedagogy at the University of Belgrade[3] (who lecture History of education, General pedagogy, Didactics (2 professors), Preschool pedagogy). We have selected interviewees based on three criteria: they all have at least ten-year experience working as a university teacher in the field of pedagogy; they teach one of the fundamental pedagogical courses, and have taken part in academic discussions (oral or written) on the issues about the nature and identity of pedagogy.

Semi-structured questionnaires were used. In order to find the categories for the analysis of university teachers' answers we have used an inductive approach to develop categories based on analysis of original data (Cohen, Manion & Morrison, 2007; Lodico, Spaulding & Voegtle, 2006).

Findings

As the issue of competences is related to the occupational profile of a profession, the interviewees were asked to define the profile and the characteristics of pedagogues. Most of them agreed that pedagogues: (1) Should function as ethical, intellectual, critical professionals (RL1, RB5, RB4); (2) Should have good methodological skills (RL1, RL2, RL3, RL4, RB3); (3) Should be able to read fundamental texts, defend their professional opinion and keep critical distance (RL2, RB5, RB4, RB3); (4) Should be able to function effectively in different occupational positions and situations, and reflect on their decisions and actions, on the decisions of others (RL1, RL2, RL3, RL4, RB4). Less often also these characteristics are mentioned: good communication and social skills (RB5, RB4, RB2, RB3), the ability to work in teams (RB2, RB3), and "pedagogical tact" (RB3).

All respondents in Ljubljana and three in Belgrade agreed that focusing on the occupational position of a (pre)school pedagogue/counsellor would mean a highly problematic narrowing down of the profile. When having occupational challenges in mind, the professors do often focus on the (pre)school pedagogue's occupational tasks and problems, but simultaneously say that the study of pedagogy has always been much more broadly conceptualized, covering topics from the macro-systemic to the micro-pedagogic levels (RL1, RL5, RL6, RB1, RB4, RB5). Moreover, the graduates have always been able to find employment in very diverse organizations.

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[2] Marked as RL – respondents from University of Ljubljana.
[3] Marked as RB – respondents from University of Belgrade.

Therefore a competence-based approach might also hinder – instead of improve – the graduates' employability.

All respondents in Ljubljana and more than half in Belgrade are rather critical about the mainstream competence discourse, and associate it with a narrow behaviouristic concept of competence: "*I understand competences as the integration of academic knowledge, skills, and attitudes* […]. *To avoid academism however, I would not want to transform the pedagogue's profile into a technicistic one.*" It seem that the critique is directed to both, to the narrow behaviouristic notion of competence, as well as towards the global higher education policy which is trying to economize higher education at all hazards (RL3), also by promoting the narrow concept of competence.

Nonetheless, many respondents agree (RL2, RL3, RL4, RL5, RB1, RB2, RB5) that competences can be defined holistically and thus gain more pedagogical value: "*I draw on the concept of competence but in a way I find it appropriate for the study of pedagogy; I understand it as an integration of knowledge, action and reflection. By action I understand mostly methodological skills*" (RL2).

Interestingly, respondent RL3 explains that the concept of competence could be explained in the sense of *phronesis*, but *phronesis* requires a thorough theoretical study which policy does not support. "*You simply cannot comprehend a professional problem without leaning on theory. The issue is not either to choose a discipline-based curriculum model or a practically-based competence model; it is about the integration of the two. Dewey's statement that theorizing is lame and practicing is blind is still valid*" (RL3).

Even the respondent who expressed one of the most critical attitudes about the competence concept (RL4), says that she finds MacBeath's conceptualization useful: "*Students should reach learning aims at three levels: at the levels of knowing, feeling and acting; […] each level encompasses the dimensions of understanding, abilities (or competences) and values*" (RL4).

Despite having critical stance toward competence-based approach one respondent (RB4) claimed that insistence on competences in Serbia has challenged the prevailing encyclopaedism in the study programmes and provided a good opportunity to reflect on the essence of the profession.

Conclusion

The study has revealed that the competence-approach is generally much better accepted by respondents from Belgrade than those from Ljubljana. Compared to respondents from Ljubljana University, the respondents from Belgrade University also express slightly more pronounced need for the practical skills development. The majority of the interviewees are however rather reserved and critical to both, competence approach as well as the practical skills development; they fear that in the given political and societal atmosphere competence-approach would lead to its reduction to *techne*.

One must however note that even the harshest critics of the competence concept express the stance that competence approach – if understood holistically and used wisely – could positively influence the students' ability to use theoretical knowledge and research skills when dealing with complex occupational challenges. If anything, our respondents agree that this is one of the fundamental study aims they strive for,

but are only rarely successful at achieving. This is why we believe that it might be useful to further investigate and develop the idea of a competence model, or perhaps, a *phronesis* model that would be suitable for the professional development of pedagogues.

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EDUCATING TEACHERS FOR INTERCULTURAL EDUCATION

Abstract

The paper begins with a short overview of the development of intercultural education and proposes a definition of interculturality in education as a pedagogical principle that guides the entire process of planning, implementing, and evaluating education at the systemic, curricular, school, and classroom levels to enable recognition and empowerment of all minority groups. Measures appropriate for the different levels are discussed. The paper concludes with an overview on teacher education for the implementation of the principle of interculturality and proposes a framework model of such an educational plan.

Introduction

Discussions on intercultural or multicultural issues in education have been taking place in educational theory and practice since at least the 1960s. After first focusing on ethnic revitalization movements in the U.S.A., Canada, and Australia, they were soon applied to the migration processes in Europe. After World War II Europe experienced many waves of economic migration. On one side migrants from colonial nations began arriving, and on the other were the migrants from Southern and Eastern Europe moving to Western and Northern Europe; all were looking for better lives and working conditions (Banks, 2009). What triggered discussions and the development of a number of paradigms of intercultural[1] education, was however not only the mere fact of migration, a phenomenon that is as old as human race itself.

There are at least two key factors that influenced its emergence in second half of the twentieth century. The first was the adoption of The Universal Declaration of Human Rights (United Nations, 1948), which states that everyone is entitled to all the rights and freedoms set forth in the Declaration, without distinction of any kind, such as race, colour, sex, language, religion, political or other opinion, national or social origin, property, birth or other status (Article 2). Moreover, according to the Declaration (Article 18) everyone has the right to freedom of thought, conscience and religion, and freedom, either alone or in community with others and in public or private, to manifest his religion or belief in teaching, practice, worship and observance. Second, studies began to reveal that – in spite of greater formal equality – minority students or students with immigrant backgrounds did not actually have the same equality of educational opportunity as majority populations. Their educational achievements were also considerably lower, so educational theory began to seek an explanation and develop educational models that would bring about better outcomes for everybody.

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[1] In the U.S.A. and other Anglophone countries the term multicultural is usually used, while in Continental Europe the term intercultural prevails.

The conceptualization of intercultural education

The development of intercultural education is abundantly documented (Auernheimer, 1997; Banks, 2009; Cushner, 1998; Diehm & Radtke, 1999; Figueroa, 1998; Grant & Portera, 2011; McCarthy, 1995; Seeberg et al., 1988; Sleeter & Grant, 1987, 2006, etc.), revealing a multitude of theoretical views and practical models. To simplify only a little, we can conclude that there are two primary global approaches to the issues of a multicultural student body. The first approach has been often called the assimilationist approach, and the second integrative or multi- or intercultural approach (Banks, 2009; Cushner, 1998; Diehm & Radtke, 1999; Troyna, 1993). In the U.S.A. the multicultural approach has soon developed, but it has never been monolithic. On the contrary, by 1987 Sleeter and Grant described five prevailing models of multicultural education (updated in 2006). They distinguish the following models: (1) teaching the exceptional and the culturally different, the main aim which is to prepare students to function in American society; the model did not leave the assimilationist perspective completely behind, but was inspirational for later models; (2) human relations, which strives to build better relationships among people of different cultural backgrounds, so as to reduce hostility and prejudice; it does not address the issue of power relations; (3) single-group study, which advocates comprehensive study of marginalized groups' history, experiences with oppression, and resistance; its main problems are that it leaves mainstream curriculum untouched and can promote separatism; (4) multicultural education, based on promoting values such as cultural diversity, respect for difference, human rights and social justice, and equal opportunities; the model is designed to include the entire student population, but has been criticized for not paying enough attention to structural inequalities; and (5) multicultural and social reconstructionist education, which Sleeter and Grant prefer, is grounded in the critique of modern culture and its unjust structure; in their view, education should empower students from different social groups experiencing discrimination to challenge the unjust status quo.

Germany was one of the first nations in Western Europe that reacted to the mass immigration. Already by the 1960s, the field of social pedagogy (*Sozial Pedägogik*) had established *Ausländer Pedägogik* ("foreigner pedagogy", see Diehm & Radtke, 1999; Faas, 2008). Foreigner pedagogy was based on assimilationist notions, and was focused on the migrant students who were perceived as handicapped by their poor command of the German language. Foreign pedagogy thus emphasized the teaching of the German language and other compensatory strategies targeted at various learning gaps. In the 1980s and 1990s, foreigner pedagogy underwent serious critique, and has since been gradually replaced by intercultural pedagogy (at least in theory, less so in practice). Intercultural pedagogy has brought about a complete change of focus: it addresses all students and defends the idea that citizens need to learn to live in a culturally diverse society. Moreover, minority identities have to be recognized and every student needs to be supported to fulfil her potential and aspirations. Critical pedagogues have also argued that intercultural pedagogy needs to address the power inequalities of the education system itself, which primarily involves implementing a multi-perspective and anti-bias curriculum and creating a democratic, pluralistic, inclusive school ethos. Similar stances has been

taken by some English authors, who have developed anti-racist education (Auernheimer, 1997; Faas, 2008; Troyna, 1993).

(American) critical multiculturalism, (English) anti-racist education, and (German) critical intercultural pedagogy share many common traits. Hence, intercultural education is not only about appreciating cultural richness, but also about a critical understanding of knowledge; students must be taught to question the very origins of knowledge and power relations embedded in it (Apple, 1992). Moreover, intercultural education does more than show respect for minority identities; it investigates the nature and role of identity in the contemporary era (Beck & Beck-Gernsheim, 2002). Similarly, Chen, Nimmo and Fraser (2009) propose the following aims to be pursued from preschool education forward: (1) to nurture the construction of a knowledgeable, confident identity as an individual and as a member of multiple cultural groups; (2) to promote comfortable, empathetic interactions with people from diverse backgrounds; (3) to foster each child's ability to critically think about bias and injustice; and (4) to cultivate each child's ability to stand up for herself or himself, and for others, in the face of bias and injustice. (Chen, Nimmo & Fraser, 2009, p. 101).

Based on these considerations, I propose interculturality in education be defined as a pedagogical principle that guides the entire process of planning, implementing, and evaluating education at the systemic, curricular, school, and classroom levels to enable recognition and empowerment of all minority groups. It is a principle that supports: (1) the improvement of minority students' learning outcomes; (2) better recognition of their identities; and (3) a common education based on the values of participation, and cooperation.

Measures supporting interculturality

The implementation of the principle of interculturality is very demanding since it requires both a systemic restructuring and a considerable change of perspective from any number of actors. It also opens up new dilemmas and pitfalls, and must be therefore done with utmost caution. In order to be successful it should be introduced at several levels; if any is left out the chances of success decline precipitously; in general pedagogy we know that the effectiveness of education depends on the unity of educational action and that the more the educational factors are harmonized, the more likely is success. A perfect unity, however, remains impossible, since contradictions are to a certain extent always inherent to educational aims (Ermenc, 2005; Schmidt, 1975). To illuminate the complexity of intercultural education, let us first touch upon some of the possible measures at the systemic and curriculum levels – the number and nature of these measures cannot be exactly defined, since they depend on specificities of each educational, social, and political context.

1.   The introduction of multi-perspective and cultural responsive curricula. Curricula from which the cases of ethnocentrism, stereotypes, and prejudice are eradicated; curricula that present history, geography, literature etc. from multiple perspectives and by inclusion of minority and neglected voices; and curricula that are flexible enough to enable teachers to respond to characteristics of their students. Curricula are accompanied by textbooks and other learning materials that follow the same ideas and include also texts, pictures, and names that give minority students an opportunity to identify with them.

2.   The reconceptualization of mother-tongue learning and the promotion of multilingualism. The language of instruction is not the mother tongue of all students. If this is not recognized, an exclusivist discourse can evolve.

3.   The organization of intensive and long-lasting second language learning, with simultaneous systematic support for early inclusion of immigrant students into mainstream education.

4.   Systemic support for teacher education that is based on interculturality in both the pre-certification and continuing professional education contexts.

5.   Undertaking studies that investigate factors influencing low achievements of minority students and the evaluation of the success of intercultural interventions.

How should schools and teachers support the principle of interculturality?

Policymakers are responsible for the implementation of such system- and curriculum-related measures, which represent a base on which schools and teachers can build and without which their efforts are severely limited (Ermenc, 2007). In order to bring them to life however, a profound change of a school's ethos and pedagogical practices is required. Without teachers' readiness to change, interculturality will remain a purely paper tiger. Several scholars have proposed important measures that schools and teachers should take (Ermenc, 2010; Rutar, 2014; Vižintin, 2013).

1.   Organizational measures: We have seen that intercultural education is not only about tackling the issues concerning newly arrived students from other countries. Schools, which welcome them on a regular basis, need to establish a sort of welcoming system including the provision of information booklets in several languages, interpreters (other students, local community members, etc.), intensive language courses, tutoring systems, and support mechanisms organized together with minority parents and minority societies.

2.   Individualization and differentiation: A fundamental characteristic of every school that promotes an inclusive school ethos is its student-centeredness: individualized instruction and instruction in small groups is combined with whole-class instruction and common activities. Differentiation of students is however never long-lasting, and never functions as a means of segregation. The basic principle the school follows is to occasionally separate, but only for the purposes of bringing together in the end.

3.   Intercultural and inclusive school ethos refers to giving voice to minority students: discussing ethnic relations in society, reflecting on the reasons for ethnic conflict, getting to know minorities' art, scientific achievements, etc. Inclusive schools also teach their students that heterogeneity is a normal state of humanity, that every person is in some way different from all others and that differences should be respected. Fundamentally, all people are the same in their human dignity and in their human needs.

4.   Teachers' teamwork and teachers' responsibility: not only language teachers but all teachers are responsible both for the creation of an intercultural and inclusive school ethos and also for providing support to every single student.

5.   Teachers' responsiveness and awareness of one's own prejudices: Teachers are only human and have prejudices and (positive or negative) stereotypes about their students. As teachers' prejudices and stereotypes may have a negative impact

on their rapport with students and thus also on students' learning achievements (Wiggan, 2007), it is crucial that teachers become aware of them and do everything in their power to eradicate them. Teachers need to pose themselves questions such as: "Do I respond when I notice that a student is pushed aside or ignored? Do I respond when I notice that a student does not understand the lesson? Do I expect too little from this student (is he/she capable of more)? Do I really respect and treat all my students equally? What will I do about it?"

Educating the teachers

Bringing the principle of interculturality to life is certainly not an easy and straightforward task. One of the crucial conditions that must be fulfilled is appropriately-educated teaching staff, but the definition of "appropriate" is hardly self-evident. Research carried out in Slovenia over the last decade (Ermenc, 2004; Peček & Lesar, 2006; Rutar, 2014; Vižintin, 2013) shows that teachers often believe that what they need is some extra knowledge on teaching methodologies and more support from auxiliary staff, who can help accommodate new coming students with poor command of the language of instruction. The findings of those studies, however, show that what the teachers may need even more is a change in their own attitudes: they need to take responsibility for all their students' achievements and for their recognition. There is no doubt that they need to be supported by systemic, organizational, and curricular measures, but they also should be aware that they have a crucial role to play and a solemn responsibility to uphold.

I propose that teacher education for the implementation of the principle of interculturality be conceptualized around three broad aims: informative aims, formative aims, and aims related to professional characteristics.

1) Informative aims (or, "Knowing What") refer to knowledge that teachers need to have: they need to have some basic knowledge of migration theory (causes of migration), anthropology (cultural relativism), social psychology (identity formation in primary and secondary socialization), identity politics (minority empowerment), postmodern views on truth, values and identity, and multilingualism.

2) Formative aims (or, "Knowing How") refer to teachers' abilities to make use of different didactic approaches and strategies, to deploy intercultural communication skills, and to communicate effectively with culturally diverse parents. They also include teachers' ability to counteract prejudice-based bullying. Chen, Nimmo and Fraser (2009) point out that teachers must know how to draw on students' culture and how to capitalize on students' prior knowledge.

3) Professional attitude (or, "Knowing Why"): Teachers are not always aware that their responsibility is not only knowing the subject they teach and the didactic methods they employ, but that they are also responsible for displaying a professional attitude. From the intercultural education point of view, it is crucial that teachers are willing to re-examine their own feelings toward minority students and different cultures critically and investigate how their attitudes might influence their practice. As teachers, they are partly but crucially responsible for every student's progress and well-being. Nieto (1999) stressed that teachers should also be curious and eager to learn about the students, and should see their students as individuals, not just as part of the group.

Conclusion

Achieving such ambitious gaols demands changes on the cognitive level, of course, but also on the affective and conative levels: teachers need not only to possess new information and knowledge (cognitive level), but also to be aware of their emotional interpretation of information and knowledge they have gained and understood (affective level). Moreover, they need to be willing to act on what they know (conative level). Huitt and Cain define conation as follows:

Conation refers to the connection of knowledge and affect to behavior and is associated with the issue of "why". It is the personal, intentional, planful, deliberate, goal-oriented, or striving component of motivation, the proactive (as opposed to reactive or habitual) aspect of behavior […] Atman (1987) defined conation as "vectored energy: i.e., personal energy that has both direction and magnitude" (p. 15). It is closely associated with the concepts of intrinsic motivation, volition, agency, self-direction, and self-regulation (2005, p. 1).

Such complex aims cannot be achieved with one quick fix. Intercultural teacher education should begin at the undergraduate level, when teachers-to-be gain the basic subject, pedagogical and psychological knowledge and insight. At that level, the focus can mostly be on cognitive levels, on "knowing what". Later on, intercultural teacher education should become a part of wider professional teacher development, involving the attendance at seminars and workshops, where more emphasis is usually given to the improvement of teachers' expertise and where more issues related to affective and conative levels begin to be raised. To be most successful, however, the affective and conative levels can be influenced at the school level by setting up a collaborative and externally supported professional development model. Such a model may include teachers' teamwork, formative peer observation, and cooperation in different projects with external experts and researchers.

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BECOMING A STUDENT: THE LIMINAL EXPERIENCE

Abstract

Research on the transition of students into Academia has previously focused on intelligence and effort as determinants of success. In this article I will argue that the liminal experience of transition into the academic environment is enhanced by multi-logic spaces where curiosity and focus are key attributes of the academic literacy classroom. In this educative nurturing space the mentor-lecturer and her students engage meaningfully and with academic curiosity with socially rich experiential learning. Monological teaching disregards the voices that should be heard in the multi-logical classroom where the mentor-lecturer encourages constructivist interaction between herself, students as well as reading texts and student generated writing.

Key words: dialogue, liminality, multi-logue, transition, lecturer-mentor, Academia

Introduction

A monologue delivered by a lecturer speaking at her students represents sounds of silence rather than dialogue. Dialogue within the academic environment implies a cognitively and socio-conventional safe space where role-players can mediate within a non-threatening environment. The concept of multi-logueing, however, reaches beyond the confines of merely a dialogue between lecturer of academic literacy and her students by introducing additional voices. A multi-logic academic literacy classroom is established where students may interact with other students, the lecturer-mentor and scholars from other fields. These voices may also include the texts used as pedagogical tools, teaching strategies and multimedia that form part of the curriculum. The voices become reflective tools and strategies for mediation among lecturer-mentor and students towards transition into the university environment and Academia.

Aim of this article

My main research problem and aim of this article, as it flows from the title, is: what guidelines can be developed for lecturer-mentors to improve their understanding and subsequent operationalization of the liminal experience of students transcending into university? The following questions should lead me towards an understanding of this problem.

- Research question 1: What is the ontological nature of monologue, dialogue and of multi-logue educational spaces?
- Research question 2: Who are the participants within the multi-logue educational space in the Academic literacy classroom? How is the liminal experience of thresholding into Academia realised within the Academic literacy classroom?

- Research question 3: What are the qualities or traits necessary for mentor-lecturers to facilitate the liminal thresholding experience within the academic literacy classroom?

The research design I employed to answer my research questions is situated in the interpretevist paradigm using a qualitative methodology situated in the hermeneutic-phenomenology. As data generating methods I used video-analysis and semi-structured focus group interviews, as well as document analysis. The data was analysed using a computer software program, namely ATLAS.ti.[TM].

My research methodology both enables and requires me as a mentor-lecturer in the multi-logue educational space of the Academic literacy classroom to interpret (i.e. explore, understand and explain) the students' lived liminal experiences (De Vos, et al., 2005, p. 270). As the researcher I engaged in dialogue with information-rich students, who have all experienced the challenges of thresholding into Academia.

Transposing monologue to multi-logue

Lecturer-mentors are challenged when creating safe, dialogic-educative spaces for first-year students, where optimal teaching-learning of academic writing can be accomplished. My research is aimed at creating such safe spaces in which first-year students might not only attain and practice writing skills, but in which a liminal portal towards their future scholarliness may also be created. Scholarliness in this context refers not only to the intellectual ability of the student but also to critical evaluative capacity to a *paideia*[1] (full-blown completeness) of the soul. These qualities should be allowed to emerge and permeate all in-class proceedings as overarching pedagogical purpose, rather that acquiring the mere *techné* (skills and knowledge) of writing. Du Preez (2008, p. 64) articulates the notion that a teacher (lecturer-mentor) should facilitate learning and not merely act as a knowledge conveyor. The mentor-lecturer should support students in their own efforts at dialogue and multi-logueing rather than simply supplying the skills and knowledge as stipulated in the outcomes of academic literacy.

Novice students are widely believed to be enquiring *works-in-progress*. They often display vulnerability when taking their first excited yet daunting steps within the novel milieu of Academia. According to Palmer et al. (2009) and Gourlay (Shady & Larson, 2009, p. 181) this period of transition should not merely be studied as an entrance into a 'community of practice' using an apprentice-type model. Gourlay (Shady & Larson, 2009, p. 108) proposes that the impervious nature of both the transition into Academia and the process of acquiring academic literacy skills are closely related. A liminality approach to student thresholding through the academic literacies is suggested as a probable methodology of practice towards full-

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[1] The term *paideia* (Greek: παιδεία) refers to the education of the ideal member of the polis. Originally, it incorporated both practical, subject-based schooling and a focus upon the socialization of individuals within the aristocratic order of the polis. The practical aspects of this education included subjects subsumed under the modern designation of the liberal arts (rhetoric, grammar and philosophy are examples), as well as scientific disciplines like arithmetic and medicine. An ideal and successful member of the polis would possess intellectual, moral and physical refinement.

blown completeness. This is a lacunus I specifically intend to investigate, by means of video analysis of Academic literacy classes, in order to explore, understand and explain how multi-logueing is taking place in these classes.

Dialogue was coined from the Greek *dia* and *logos* (*dialogos*) denoting discussion and discourse (Rule, 2007, p. 320). This presupposes that the teaching and learning of subject related knowledge and skills, particularly in the academic literacy classes, can best be done within a critical, open and transparent dialogic environment.

Definitions of dialogue seem to emphasize the changes in conceptualising dialogue in the past. Authors including Rule (2007), Du Preez (2008) and Shady & Larson (2010) depict various definitions of dialogue, specifically with regard to the semantic transformation that these definitions have undergone over time, as educative understanding and paradigms developed. Rule (2007, p. 320) defines dialogue with reference to Plato (428-328 BC), who understood dialogue as a relationship. Buber (1878-1965) believed that authentic dialogue, imply participants who are attentive to one another and emphasised that dialogue is the opposite of monologue. In 1929 Jürgen Habermas theorised dialogue as communicative action which was non-authoritarian and non-prescriptive (Du Preez, 2008, p. 65). It is from this definition that the spirit of dialogic harmony was conceptualised (Rule, 2007, p. 323). Paulo Freire's (1921-1997) amongst others conceptualised dialogical education as an exercise of freedom whereas Moacir Gadotti (1941) argued that conflict is at the core of essential dialogue (Rule, 2007, p. 320). Burber, Shady and Larson as well as Volf (1956) transcends the restrictions of merely tolerating difference within dialogue by asserting that dialogue presupposes accepting and embracing one another's locus (Shady & Larson, 2010, p. 95) Although there seems to be conflicting definitions of dialogue, theorising about the nature of dialogue brings about a greater need for reconceptualising dialogue as multi-logue.

The concept multi-logueing is as yet a somewhat tangled and vague term. The term multi-logue was first created and used by Newman in 1999 (Newman, 1999, pp. 653-654) in a different setting from that of learning-teaching environment. In the context of transition into Academia of the novice student multi-logueing needs to be re-conceptualised. I will attempt to do so in the following section.

Transition into Academia through multi-logical spaces

Transition can be conceptualised as an event or point of orientation where a change of relationships as well as practices and roles in a person's life are evident. Novice students in the liminal position of transition into Academia are perceived as adults in transit (Schlossberg, 1984, pp. 5-13). These students find themselves in an anticipated liminal situation where they know they will experience the impact of the transition into Academia (Evans et al., 1998, p. 3). According to Schlossberg et al. (1989) adults in transition often feel marginalised but if they are able to communicate within a community, in this instance the Academic literacy classroom community, they become involved with the lecturer-mentor, co-students and academic texts used as pedagogical tools, teaching strategies and multimedia that form part of the curriculum. The communal setting of the Academic literacy classroom energises and navigates novice students' transition into Academia. In this sense the communality of the liminal experience provides a reassuring multi-

logueing space for students to evolve skills and knowledge regarding the academic environment which spans university life and is closely linked to student success and student wellness within the academic environment.

The concept of multi-logueing reaches beyond the confines of merely a dialogue between lecturer of academic literacy and her students as well as inter-student communication by introducing additional voices. The anthropology of the multi-logic Academic literacy classroom consists of groups of role players that may vary according to the content and skills (critical thinking, reading, discussion, critically evaluation and writing) dealt with during a particular session. The core participants, however, always include the novice students, a lecturer-mentor and academic text. The social and intellectual interaction between students and lecturer-mentor contributes towards a milieu of recognition and approval but also includes conflict. The Academic literacy classroom offer both teachers and learners with a safe educative space for discussion without fear of humiliation, discrimination and derision (Rule, 2007, p. 321). Within this space academic text, which form the focus of most learning-teaching activities, seems to become a role player or additional voice interplay within the multi-logic educative classroom. Students also recalled during the focus group interviews that members of staff and scholars from various faculties and institutions added their voices to discussions as guests when we dealt with specific themes.

As transition comprises of individual interpretation, environment and social interaction, providing students with a multi-logic setting where the liminal position they occupy may be embraced and shared, conventions of Academia implicitly and explicitly learnt and individual participation fostered should be encouraged. The Academic literacy classroom provides the opportunity and institutional space for transition.

As a mentor-lecturer of academic literacy as transitional tool for newcomer students into the academic world my aim is to educate leaders and visionaries who will become trendsetters of new vistas in their chosen fields of study. This goal can, however, never be accomplished if I allow only my own voice to be heard. A monologue delivered by a lecturer speaking at her students represents the sounds of silence rather that the collective academic discourse needed for students within the liminal experience of transitioning Academia. Dialogue within the academic environment represents a socio-conventional space where participants can mediate within a non-threatening environment (Rule, 2004, p. 1). The concept of multi-logueing, however, reaches beyond the confines of merely a dialogue between lecturer of academic literacy and her students by introducing additional voices. These voices may include the texts used as pedagogical tools, teaching strategies and multimedia that form part of the curriculum. The voices become reflective tools and strategies for mediation among lecturer – mentor and students towards transition into the university environment.

The academic literacy lecturer-mentor as facilitator of multi-logueing and transition

Transition, whether a positive or negative experience, creates stress reactions (Evans et al., 1998, p. 3). Although students are aware of the liminal phase they are about to enter and the changes they might have to make, they often rely quite

substantially on support from other people to get through the transition. Evans et al. (1998, p. 5) suggests that intervention by a professional, in this case the lecturer-mentor in the multi-logical Academic literacy classroom, is one of the fundamental partners of student transition into Academia.

As the process of data coding progressed I was able to identify characteristics of lecturer-mentors students found particularly important and valuable as being conducive in their transitional process. These included flexibility in coping with challenges and questions, fairness to all students, challenging the students to achieve, positivity, fairness and consistency in teaching standard. An additional challenge for lecturer-mentors seems to be guiding students into an unfamiliar culture (Academia) where academic wellness is very closely linked to emotional and physical wellness (Van Dyk, 2012, p. 4). The complexities of the Academic literacy classroom as transitional multi-logueing space.

Homer, in his heroic story, *The Odyssey*, describes a mentor as a trusted friend and guide (Riverside Webster's II New College Dictionary, 1995). Mentoring refers to a series of minor successes achieved through consistent and enduring rapport with the student. The lecturer-mentor, consequently, leads the student in transition towards his journey by supporting and acknowledging the goals achieved. She creates a supportive multi-logic educative space within the Academic literacy class where the student feels free to make his academic voice and opinions heard without fear of ridicule (Rule, 2004, p. 1). She fills the role of academic companion to the novice and becomes an example of scholarliness. Although the student himself has to transit through his own porthole into Academia the lecturer-mentor fuels his development.

Students perceive their own primary goals within the academic environment to be acquiring academic knowledge and skills and to be able to think about, read, discuss and critically evaluate academic content and theories. According to Mulnix (2010, pp. 2-4) these skills, and especially critical thinking and argumentation, are not merely acquired through formulas and rules taught and learned but has to be practiced within an environment conducive to social learning. It is within this context that the role of the lecturer-mentor is established.

Conclusion

The true mentor is a provocateur who supports the transition of her learners towards the pivotal experience of the novice student. We hear our students' voices amongst those who speak. The voices resound and bounce off the walls of each other, outwards and inwards they sound and are heard. Our novices are in transition but the path is set, their journey mapped. As their lecturer-mentors we take on the challenge and create safe, multi-logic educative spaces for our students, where optimal teaching-learning of academic speaking and writing can be accomplished.

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TEACHERS' PERCEPTIONS OF AND SOLUTIONS FOR STUDENT SCHOOL FAILURE

Abstract

School failure is an important aspect of students' development and their progression through the process of education, as well as for the functioning of the education system itself. The paper reports the results of a qualitative study exploring the relationship between primary school teachers' perceptions of student school failure and the solutions suggested for its overcoming. Obtained data pointed to the differences of the solutions for the problem of student school failure suggested by teachers with respect to their own time perspective (an orientation towards past, present or future). There were also certain differences in the suggested solutions for the problem of student school failure depending on teachers' conceptualisation of school failure (poor grades or misbehaving), but these differences were less prominent. It has been concluded that it is needed to include the knowledge about the role of personal time perspective into in-service teacher training in order to raise teachers' skills for coping with the problem of student school failure.

Key words: Student school failure, time perspective, conceptualisation of student school failure, teachers, primary school, qualitative study

Introduction

Student school failure is as an important variable for their progress through the process of education, as well as for the functioning of the education system itself. Poor grades, lack of knowledge and misbehaviour make the educational process difficult, thus narrowing the possibilities for students' professional and personal development and their social integration (Džinović, 2010; Malinić, 2009; Maksić & Đurišić-Bojanović, 2004; Spasenović, 2008). A number of studies have shown that student school failure, reflected in poor grades, is connected with disruptions of instruction, absenteeism from the school, negative attitudes towards learning, teachers and parents, as well as with a negative self-perception, low self-esteem, a sense of helplessness, etc. (Gašić-Pavišić, 2005; Malinić, 2009; Milošević, 2004). On the other hand, among students who fail in school there were children with high creative capacities (Maksić, 2010).

The factors that essentially affect student school achievement comprise family context, school context and students' personal features (Малинич & Милошевич, 2007; Milošević & Malinić, 2007). School failure is most commonly defined as a failure of an individual to develop and use his/her own potentials (Malinić, 2009). However, practitioners often treat student school failure as an unfavourable, even a pathological phenomenon attributed to the student (Džinović, 2010). For example, students who fail in school were perceived as "perpetrators" or "victims of circumstances" by school psychologists and pedagogues, whose job should actually involve participation in solving the problem of student school failure (Gutvajn & Ševkušić, 2013). Attributing school failure to students is reinforced in the context of

the findings of the research studying the effects of negative evaluation: the persons with low self-esteem were motivated to confirm the negative image of themselves (Bodroža, 2011).

Student school failure can be considered as their own personal choice aimed at providing resistance to school demands (Džinović, 2004). The prevailing discourse on school failure, obtained in the discussion with underachievers, included the following: the school did not provide a secure path towards the professional success in life; the school was not a context in which underachievers could fulfil themselves; underachievers were not interested in what was happening at school; teachers were not interested in underachievers (Džinović, 2009). Another study, dealing with the life priories of underachievers, has established that the construct of acceptance by peers was the core construct for being successful in life (Gutvajn, 2010). At the same time, the majority of students who failed said that school achievement was their most significant life priority! It has been concluded that teachers should work systematically on raising students' motivation for school learning and the continuation of education.

The qualitative study on the significance of student school failure for their teachers has pointed to two main topics: the perception of student failure and suggesting the solutions for its overcoming (Maksić, 2014). The majority of teachers reduced the problem of school failure to poor grades and perceived it as a current problem happening here and now (with the dominant orientation towards present). Almost always, the teacher was perceived as the key agent in pedagogical interventions aimed at solving the problem of student school failure. The focus of these interventions was to implement instruction based on engaging the students and producing tasks suited to their capacities, interests and preferences. The suggested intervention for overcoming student school failure most often referred to changing the teaching and learning methods and the behaviour of the teachers. Additionally, one half of participants used words such as 'I think' or 'my opinion is' which implied personal involvement that was interpreted as ascribing higher personal significance to the student school failure (Spiel & von Korff, 1998). Still, other half of participants did not show that type of personal involvement in their answers.

Apart from the dominant concept "student school failure is poor grades" (65.8%), two more concepts were present in teachers' answers: "student school failure is misbehaving" (13.2%) and "student school failure is poor grades and misbehaving" (21.0%). There were noticed three time orientations of teachers in their answers: the present, past and future. The prevailing present-orientation (67.5%) was concentrated on finding the way to overcome student school failure in the current situation. The orientation towards past (15.8%) started from the assumption that there were causes preceding the student school failure which had to be revealed. The orientation towards future (16.7%) pointed to the goals because of which students should be successful in school. The variations in teachers' concepts of student school failure and their time orientation were an incentive for conducting the following study.

The research problem in this study referred to the way in which teachers' perceptions of student school failure affected the solutions for overcoming school failure that they suggested. Two research questions were defined:

1) What is the relationship between teachers' concept of student school failure and the suggested solutions for its overcoming?
2) What is the relationship between teachers' time orientation and the suggested solutions for overcoming student school failure?

Method

Participants: Research participants were teachers (N=105) and school psychologists, pedagogues and headmasters (N=9) from five primary schools in urban and rural areas in Serbia. Participants' age ranged from 22 to 64 (42 on the average), and the majority of participants were female (80.7%).

Materials and procedure: Participants were asked to consider an open-ended question: Imagine the worst possible student, who does not know the subject matter, who misbehaves, who isn't interested in anything, won't study and causes problems. What would you do with him/her? How would you motivate him/her for learning? Participants provided answers anonymously on a blank sheet of paper.

The obtained answers were subjected to thematic analysis guided by data and discussed in Maksić (2014). Consequently, only basic pieces of information about the coding process that are relevant for the present study are summarised here.

Two main topics identified in participants' answers were perception of student school failure and suggestions for overcoming student school failure. Within the perception of student school failure, the analysis revealed two subtopics: the conceptualisation of school failure (poor grades; misbehaving; poor grades and misbehaving) and time perspective (orientation towards past, present or future). Within the suggestions for overcoming student school failure, three subtopics were revealed: activity holder (the teacher, other key holders, the teacher with other key holders); the type of intervention (a pedagogical approach, a psychological approach, the pedagogical and psychological approach combined, a systemic approach); the subject of change caused by the intervention (the student, the teacher, the student and teacher together, a broader environment). It was perceived that some participants answered in the first person, while the answers of others were impersonal. Answering in the first person was interpreted as a higher level of participant's ego-involvement in the issue, including higher sensitivity for the problem of student school failure and higher personal responsibility for its solution.

The process of coding will be illustrated by two examples:

Example 1: I'd give a task to the student to explore why it would be important to learn something that will be useful for him, for example, to obtain a driving licence[1] (A personalised answer; school failure is poor grades; the study participant oriented towards future; the student is activity holder; the intervention is pedagogical; the teacher is subject of change).

Example 2: Conversation with the student; looking for causes of this kind of behaviour; giving tasks appropriate to student's capacity[2] (A non-personalised answer; school failure is poor grades and misbehaving; the study participant oriented

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[1] Dala bih zadatak da istraži zašto bi njemu bilo važno da nešto nauči što bi njemu bilo korisno, npr. za polaganje vozačkog ispita (original answer in Serbian).

[2] Razgovor sa učenikom; pronalaženje uzroka takvom ponašanju; davanje zadataka koji su prilagođeni mogućnostima učenika (original answer in Serbian).

towards past; the teacher is activity holder; the intervention is pedagogical and psychological combined; the teacher is the subject of change).

Data analysis: Frequency and percentage analysis of participants' responses about the possible practices for overcoming student school failure was carried out with respect to their conceptualisation of student school failure and personal temporal orientation. Comparisons were made only at the level of per cents because of the nature of the available data.

Results and discussion

The comparison of the suggested practices for overcoming school failure provided by study participants who conceptualised student school failure as poor grades, as misbehaving or their combination revealed a few differences among these three groups of participants.

The only case where the participants holding the concept "student school failure is poor grades" differed from the participants holding the concept "student school failure is misbehaving" or those with the concept "student school failure is poor grades and misbehaving" was the one referring to the subject undergoing change during the intervention aimed at solving the problem of student school failure. Those participants who held the concept "student school failure is poor grades" considerably more frequently answered "the student and teacher together" (30.7%) compared to the participants with the concept "student school failure is misbehaving" (20.0%) and those with the concept "student school failure is poor grades and misbehaving" (12.5%).

The majority of differences in perceiving school failure and the suggestions for its overcoming occurred between those participants who held the concept "student school failure is misbehaving" and those with the concept "student school failure is poor grades and misbehaving". The former were mostly past-oriented (46.7%), expressed higher ego-involvement in their answers (60.0%), and most frequently suggested only the "pedagogical approach" (40.0%) or only the "psychological approach" (33.3%) for solving the problem of student school failure. On the other hand, the participants with the concept "student school failure is poor grades and misbehaving" were largely present-oriented (54.2%), provided more impersonal (62.5%) than personal answers, and most often suggested a combined "psychological and pedagogical approach" for overcoming the problem of student school failure (41.7%). The pedagogical approach was focused on the changes of instruction and didactics, while the psychological focused on counselling and other kind of psychological treatment for the student.

Once we compared the suggestions of research participants dominantly oriented towards past, present or future for resolving the problem of student school failure, a number of differences among these three groups were revealed.

The majority of differences in the perception and the suggested solutions for overcoming school failure appeared between future-oriented and past-oriented participants. Future-oriented participants answered personally more frequently (73.7%); most often held the concept "student school failure is poor grades" (73.7%); largely advocated "the pedagogical approach" in overcoming school failure (42.1%), and most commonly saw "the student and teacher together" as the subject of change aimed at overcoming school failure (42.1%). On the other hand, past-

oriented participants were less personally involved in their responses (16.7% answered in the personal form); they most commonly held the concept "student school failure is poor grades and misbehaving" (50.0%); they favoured "the psychological approach" in overcoming school failure (44.4%) and most often perceived "the teacher" as the subject of change aimed at resolving the problem of school failure (44.4%).

It seems that past-oriented teachers perceived student school failure as a complex phenomenon, involving poor grades and misbehaviour, but at the same time answered impersonally, focused on the psychological intervention and saw the teacher as the activity holder and the subject of change in the intervention. The teachers oriented towards past perceived the problem of student school failure in all its complexity, but one can wonder whether they set too high demands to themselves in relation to its overcoming. Special attention should be paid to the belief of these teachers that they are the ones that should change in order to solve the problem of student school failure. A possible constructive direction of these changes should be towards acquainting the teacher with the implications of their beliefs and providing encouragement in redefining their attitude towards student school failure within their role as a teacher.

An expression of higher personal involvement in the problem of student school failure by providing more frequent answers in the first person in future-oriented teachers is a promising finding. It is interesting to note that the future-oriented teachers were more focused on poor grades within student school failure, which may point to their more realistic approach and a concentration on the part of the problem that is more important and more urgent for them. It may also be a result of a better and more rational assessment of the meaning of this problem, based on their awareness about the responsibility and expertise of teachers for this aspect of the problem. Consequently, future-oriented teachers preferred the pedagogical approach as the type of intervention and perceived the student and teacher together as the subject of change aimed at solving the problem of student school failure. It can be assumed that future-oriented teachers had more consistent and more realistic attitudes towards the concept of student school failure and their own role in coping with this problem.

Time orientations evident in teachers' perceptions of student school failure can be related to the time perspective theory (Zimbardo & Boyd, 1999; Boniwell & Zimbardo, 2004). Time perspective is a basic aspect of individual subjective experience which is demonstrated as a relative dominance of past, present or future in a person's thought. A negative view of the past causes aversion and carries pessimism, while a positive view reflects a glowing, nostalgic view of the past. A positive view of the present implies hedonistic enjoyment in the current moment, and a negative fatalistic is based on the belief that the future is predestined and uninfluenced by individual actions. The future-orientation is characterised by planning for and achievement of future goals. Academic failure of children of low socioeconomic status is related to their present orientation, while educational environment is future-oriented (Zimbardo & Boyd, 1999). On the other hand, the prevention of school failure can be successful primarily in future-oriented children.

There are several limitations to this study that have to be considered when making generalisations of the obtained results. A convenient sample was used,

which, besides teachers, comprised school expert associates and management. Larger and more differentiated samples of teachers, expert associates and school management should be used because of the different roles they play in the educational process. It is also necessary to study the differences in the beliefs of class and subject teachers. The second group of study limitations refers to the use of a very simple instrument that pointed to the importance of teachers' time perspective for their attitude towards student school failure. It would be desirable to apply the instruments measuring the time perspective, such as Zimbardo's inventory (Zimbardo & Boyd, 1999). Relevant sources of data can be obtained by focus groups discussing student school failure and by an individual study using an interview, too.

The research study presented in the paper was a small qualitative study, which only pointed towards some relations rather than confirmed them. Further research is necessary, but it is clear already that teachers should be introduced to the factors that can shape their perception and behaviour in the classroom, such as the personal time perspective. The majority of research participants were present-oriented, which is in keeping with the findings of the study on the time perspective of Serbian citizens (Kostić & Nedeljković, 2013). In addition to teachers' perspective, it is important to investigate the time perspective of students who fail in school. How can we make compatible the time perspective of teachers and students who fail in school? How can we arrive at an optimally balanced time perspective on an individual level, where the past, present and future component are interwoven and flexibly utilised depending on the demands of the situation and person's needs and values?

Conclusion

The findings of the study dealing with the relationship between teachers' perception of student school failure and the solutions suggested for its overcoming have pointed to the conclusion that the solution of the school failure problem is under the influence of perception. Teachers' engagement is more determined by their time orientation than by the concept of student school failure, perhaps because of the reason that the conceptualisation is also influenced by time perspective as a basic individual feature. Educational implications of time perspective in perceiving student school failure in order to overcome the problem of student school failure can be derived on at least two levels: from the need to introduce the teachers to the phenomenon of time perspective and its influence on individual's opinions and actions to the need for different approaches and designing different programmes of in-service teacher training for teachers with different time perspectives.

Acknowledgements

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QUALITY THROUGH HOLISTIC SIMPLICITY

Abstract

It seems as though the publication of *The Oxford handbook of philosophy of education* (Siegel, 2009) had evoked considerable discourse in the fields of philosophy and philosophy of education. The tensions and inconsistencies that were exposed between and within these fields prompted the question about the role of philosophy of education in the *practice* of education and teacher education. With a contingent exploration using hermeneutic phenomenology I have attempted to initiate a tentative resolution to this challenge – one that we may trust enough to base our actions upon. It reveals a conceptualisation of education and subsequently teacher education, which holistically encapsulates its quality imperative and its associated concerns like social justice and accountability.

Key words: Conceptualisation of education, Education in practice, Community of truth, Authentic learning, Authentic pedagogy, Facilitating learning

Introduction

The publication of the *Handbook* edited by Siegel (2009a; 2009b) had sparked off an interesting discourse which is evident in, at least, White's (2013) response to the *Handbook* and the subsequent responses of Cuypers (2014), Howe (2014), Laverty (2014), Biesta (2014) and also Siegel's (2014) reply to White's (2013) response. My concern about the discourse is, among others, the tension and inconsistencies between and within philosophy and philosophy of education, as well as the inconsistent and widely divided focus propagated by different philosophers within the latter. Since no system or policy on whichever level, whether political, economic, social and even educational – however exceptional it might be – is capable of ensuring the quality of education but the human beings participating in the phenomenon as it happens *in practice*, it seems as though that an intended philosophical consensus "has not been reached in philosophy of education" (Waks, 2014, p. 279) and that the role of philosophy of education in the "major implications for educational aims and practices" (Hirst, 2008, p. 307), may be in jeopardy.

Where should our exploration start to resolve this dilemma?

Concerning the *quality* of education, we first need to conceptualise *education*. Learning defines the 'structure' of education because "when children are exploring, experimenting, making their own discoveries, as they are innately impelled to do, their natural [neural network] structures are growing and connecting. These physical structures are the new higher-level knowledge and skill they are acquiring" (Smilkstein, 2011, p. 76). Learning is, therefore, neuroscientifically physical. However, 'nature' of learning is authentic (Lombardi, 2007) because children learn through being in constant interaction with the environment's real-life, meaning-demanding, problem-solving challenges. Even though the requisite knowledge and skills for resolving the real-life challenges are not available, the ontology of learning

compels their authentic finding, acquisition and construction – so aptly described by Frankl (1984, p. 121): "Man's search for meaning is the primary motivation in his life and not a 'secondary rationalization' of instinctual drives. This meaning is unique and specific in that it must and can be fulfilled by him alone; only then does it achieve a significance, which will satisfy his own *will* to meaning". This confirms the constructivist epistemology (Von Glasersfeld, 2008) and Kolb's (1984) experiential learning as a natural human phenomenon.

What is the qualitative nature of authentic learning?

The authentic learning environment is powerful because real-life demands making sense of continuously increasing novel domains and levels of complexity of life – including the transition between 'everyday' life and all the phases of 'formal educational' life – within which increasingly new levels of meaning have to be constructed. However, real-life does not discriminate in the demands it poses and inadvertently the participation of the whole human being – body, mind, soul and spirit – is usurped by the challenging experience of living real-life in its uncompromising complexity. Dewey (1897) said that education is not a preparation for future life; it is life itself, and that learning, thus, more often than not is "hard and protracted, confusing and frustrating… [it] involves exhilarating spurts, frustrating plateaus and upsetting regressions… Even when learning is going smoothly, there is always the possibility of surprise, confusion, frustration, disappointment or apprehension – as well, of course, as fascination, absorption, exhilaration, awe and relief" (Claxton, 1999, pp. 15-16). Under these conditions, the learner is transformed to other ways of knowing and higher realms of being and this transformation is rewarded by the hormonal excretions of the brain with what Zull (2011, pp. 53-80) calls "the deepest joy".

Authentic learning is, therefore, a matter of personal quality: The personal challenge compels the desire to create a resolution of the highest possible quality, and, why would one forfeit experiencing the deepest joy of the highest possible level of self-transcendence and its infinite possibilities? This authentic experience and the ultimate construction of the meaning thereof as well as the subsequent trans-formation takes place in the individual. No one can experience or do this for or on behalf of another human being – irrespective of the origin or kind of learning stimuli and context (social or otherwise).

Authentic learning can thus be defined as the construction of meaning by learners themselves through resolving authentic, real-life, problem-solving challenges and the exhilarating result that provides the will to engage in the resolution of an even more demanding, subsequent real-life challenge.

Why are we endowed with such a unique drive to learn authentically?

According to Heidegger (1962), at birth, we are 'thrown' into this world with its overwhelming corporate forces, voices and texts that conform us to deceptive, inauthentic being. Simply stated, authenticity is the degree to which one is prudently true to one's own talents, character, spirit and possibilities despite the continuous onslaught of external forces. Although the term 'authenticity' may be out of fashion, Barnett (2007, p. 40) maintains that 'authenticity' is perhaps the key concept within

the deep structure of education and then continues to claim that "education that does not call, does not insist, on authenticity in the student is no education". Our ontological quest is to reclaim our authenticity that must be "fought for, won and sustained". Education, then, is a lifelong enterprise enhanced by an environment that supports or, more precisely, 'nourishes' to the greatest extent possible the attempts of all people to 'find themselves' throughout their lives (Ackoff & Greenberg, 2008, p. 14).

This requires personal development of the highest order that demands hard work, courage, honesty and integrity to find the deep, cellular commitments of authentic being. "These cellular commitments are the burning fuse of purpose that snakes through our lives, always focused on the explosive realization of our full human potential and eventual self-transcendence" (De Quincey, 2005, p. 58). When this purpose is not fulfilled a kind of gnawing emptiness, longing, frustration and displaced anger takes over with dreadful results.

This is in stark contrast with the acquisition of knowledge and skills as educational purpose reflected in our dominating education practices. Within this context, Barnett (2007) states that knowledge and skills – that originated in the *past* – cannot even begin to provide the foundation on which to construct our education for the 21st century. They provide only two pillars: the epistemological and the practical. "By themselves… these two pillars will topple over: they need (at least) a third pillar – the ontological pillar – to ensure any kind of stable structure" (Barnett, 2007, p. 7). Even though the function of the ontological pillar is identified as a *stabilising* one, the relationship between it and the other two requires more consideration.

Besides the fact that the future is, and will forever be, unknown, the exponential rapidity of the changing world – it's character, intensity and felt impact – has resulted in a 'supercomplex' world we have in common of which there is "a multiplication of incompatible differences of interpretation" (Barnett, 2004, p. 249) that is "radically unknowable" (Weinberger, 2012). It is because that, by extension 'I', who do not have and cannot get the future's knowledge and skills to resolve its challenges when it comes, is 'inadequate' in that sense, and has lost the sense of *being* in the world that *education* becomes vital – but with an ontological turn.

What are the consequences for education?

Education is, in principle, not an epistemological task for the acquisition of knowledge and skills but is primarily, an ontological challenge for the trans-formation of the human being, nothing less (Barnett, 2007, p. 252). The quality of this is obviously non-negotiable.

Within this context, education needs to feature "a learning understood neither in terms of knowledge or skills but of human *qualities* and *dispositions*" (Barnett, 2004, p. 247) because the latter "are durable in their nature. They constitute the student's pedagogical being. It is they that have to be the focus [of our education]" (Barnett, 2007, p. 102). The attainment of the qualities and dispositions referred to earlier are those that generate a drive towards authenticity and make authentic being possible. If these human qualities are to be achieved, education requires "a trans-formatory curriculum and pedagogy" (Barnett, 2004, p. 259).

Irrespective of the particular discipline, module or subject that provides the particular context within which the real-life challenge is designed, the *curriculum* would essentially be the attainment of essential human dispositions and qualities: the way that we want students to *be* – dispositions and the way we want students to *become* – qualities. With *will* as the learner's primary motivation in life and thus the foundational disposition with all other dispositions and qualities building upon it, the ontological quest is clear: "Through their dispositions and their qualities, students have the capacities to acquire both knowledge and skills. Through their dispositions and qualities, students become themselves… Without dispositions and qualities, nothing else of any substance is possible: Learning is not possible, the acquisition of skills is not possible, and nor is any independence of action or thought possible" (Barnett, 2007, p. 101).

The ontological pillar is, therefore, not only the stabilising pillar but indeed, the *fundamental* pillar, providing the capability of generating the other two. Since dispositions and qualities resemble virtues so closely, the former may become inclusive of essential human virtues that must be attained to make authentic being possible. Despite criticism regarding virtues and the associated issues, their educational value when they are defined as ethical competences of moral excellence is significant. The critical question is: What is the educational context within which these essential human virtues are realised? The answer lies in the result of our exploration of authentic learning.

Authentic learning as education

Living the virtues (values/character) exhibits an understanding of what is truly important, worthwhile and advantageous in life when the *relevant* features in a situation are identified accurately providing the ability to make the best corresponding choices for maintaining a flourishing life.

Therefore, the degree of quality is determined by *phronesis* or practical wisdom. A degree of 'unsophisticated purity' may be expected from young children and with increasing maturity, the increase in the sophistication of practical wisdom should be expected to affect *eudaimonia*: living a quality life. The key to attaining virtues and exhibiting *phronesis* to achieve *eudaimonia* is that "it characteristically comes only with experience of life" (Hursthouse, 2013, Online) – exactly the context that authentic learning provides.

Education cannot put the severed artificial fragments of reality (disciplines, modules, subjects, etc.) that it created, back together again by 'bringing in' a small selection thereof to an educational event. It is also unnecessary because real-life in its uncompromising supercomplexity is in itself already *authentically* holistic: Living *life* in an educational institution invariably demands exhibiting *social justice* and being *accountable* for all actions, which always have consequences.

What does a transformatory pedagogy entail?

Teacher education is determined to the fullest extent by its purpose in that it should embody transformative, authentic pedagogy. But there are two requisites: If authentic learning is about knowing myself, then "knowing myself is as crucial to good 'teaching' as knowing my subject and my students… it is a secret hidden in

plain sight" (Palmer, 2007, pp. 2-3). Subsequently teachers should be 'taught' in the manner they are expected to 'teach'. However, it should be obvious that authentic learning has an alien ring to one of our most treasured assumptions regarding education, when Oscar Wilde (1894, pp. 533-534) says that "it is well to remember from time to time that nothing that is worth knowing can be taught". Authentic learning for the attainment of essential virtues as the focus of education can only be *facilitated*.

Facilitating learning (Slabbert, De Kock & Hattingh, 2009) is the authentic pedagogy that "helps students from all backgrounds substantially" (Newman, Marks & Gamoran, 1995, p. 8), the "antipedagogical inversion" of teaching (Freudenthal, 1991, p. 48) and the practical wisdom of education. It is a pedagogy based not on abstract theoretical knowledge "but it's very opposite: knowledge of concrete particulars… situation-specific principles, context dependent, that help them to rapidly arrive at decisions that solve practical problems" (Korthagen, 2001, p. 200, 255). Facilitating learning is a pedagogy that is identified through this befitting description by Heidegger (1968, p. 15): "The real teacher, in fact, lets nothing else be learned than – learning. His conduct, therefore, often produces the impression that we properly learn nothing from him".

Facilitating learning initiates and ensures the maintenance of learners' authentic learning through a continuous, systematic process of *content void* and an increase in the levels of *quality-demanding* challenges (critical assessment of the learning) with appropriate *emotional* encouragement and support until the highest possible *quality* of learning and subsequent personal transformation has been achieved through the learners' personal efforts. The *quality* imperative is again undeniable.

That is why the community (the social structure of a pedagogical event) of truth (Gr. Aletheia=unconcealment, disclosure, discover) (Palmer, 2007, pp. 89-113) is the firmest foundation of education of which the hallmark is our commitment and willingness to submit our observations, constructions, assumptions, theories – indeed ourselves – to the community's ruthless scrutiny. Although this can never provide ultimate certainty, it can certainly rescue us from ignorance, bias, egotism, and self-deception to maintain a flourishing life, possible only through the requirement that Socrates states: An unexamined life is not worth living. The continuous demand for *quality, social justice* and *accountability* is inescapable in this context.

From this exploration, education may be conceptualised as follows: Education is creating the most powerful learning environment possible that evokes learners' empowerment to maximise (completely develop and fully utilise) their human potential (essential human virtues) through facilitating (demanding the highest possible quality) lifelong, authentic learning (resolving real-life challenges) in order to create a safe, sustainable and flourishing future for all – a quality imperative. This would also be the aim of education.

Conclusion

This tentative conceptualisation exposes education's innate quality imperative that encapsulates social justice and accountability in a holistic simplicity of outcomes in *practice* liberating its conception from the limitations of the inconsistent current discourse in philosophy of education.

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HAS THE CHANGE OF EDUCATIONAL PARADIGM REACHED EVERY SCHOOL AND EVERY CLASS?

Abstract

This rapidly changing world demands new skills and competencies for students and teachers whose role as professionals is also changing. Traditional approach to teaching/learning process involves the directed flow of information from a teacher as sage to students as receivers. How effective this transmission of the information has been can be tested by different tests. In OECD Background Report for the International Summit on the Teaching Profession (2012) it is stated that changes in the demand for skills have evident implications that teachers themselves need to acquire new competencies to be able to work effectively. In today's world where young generation is IT literate, routine or subject based knowledge is being digitized, teachers "need to enable people to become lifelong learners, to manage non-rule-based complex ways of thinking and complex ways of working that computers cannot take over easily" (p. 35).

Key words: educational paradigm, alternative education policies, teacher's
            managerial skills

Introduction

The term globalization has become a term used almost every day in the last two decades. Sahlberg (2004), a leading educator from Finland, says that globalization is typically understood as an economic, political and cultural process that changes the role of many countries in relation to global markets, agreements, and traditions. No doubt that globalization influences the field of education and this issue has become frequently analyzed in this context. Sahlberg (2004) admits that still a little work has been done on the pedagogical implications of globalization on teaching and learning and explains that globalization is having an effect on teaching and learning in three ways:

- educational development is often based on a global unified agenda,
- standardized teaching and learning are being used as propellant to quality improvement,
- stress on competition is clearly evident among students and schools.

So teachers no longer work in stable contexts, they have to rethink how teaching/learning process is organized at schools and make it more flexible, in order to able to build students' 21st century skills which is set up by a complicated mix of opportunities, challenges and demands of today's society.

GERM vs Alternative Education Policies

As Hargreaves (2003) underlines, two decades of education reforms due to globalization, have led to rigid standardization, commercialized teaching, learning

for tests and external control that has casualized teachers in many countries rather than empowered them to teach better.

In his book *Finnish Lessons* Sahlberg (2011) juxtaposes trends of The Global Education Reform Movement (GERM) which is promoted in global education policy markets with alternative education policies which can serve for creation of a good education system, such as the system in Finland:

GERM	*Alternative Policies*
- focus on core subjects	- broad and creative learning
- standartization	- personalization
- test-based accountability	- professional responsibility
- market-based management	- educational leadership
- data and control	- collaboration and trust

Fullan (2011) emphasises the same idea when talking about 'wrong drivers' – deliberate policy forces what have little chances of achieving the desired result:
- accountability vs capacity building,
- individual teacher vs group solutions,
- technology vs pedagogy,
- fragmented strategies vs integrated/systemic strategies.

The 'right drivers' or 'do drivers' mentioned by Fullan (2011) are the following:
- foster intrinsic motivation of teachers and students,
- engage educators and students in continuous improvement of instruction and learning,
- inspire collective or team work,
- affect all teachers and students.

The role of schools and teachers within the context of lifelong learning

Kivunja (2014) points out: "As the world has transitioned from the 20th century Industrial Age to the 21st Information Age, there is an increasing awareness that the skills that led to success in the 20th century are no longer sufficient to lead to success and prosperity in the 21st century" (p. 2). Alongside all the changes in today's society, new expectations appeared towards the schools and teachers. Nowadays schools are the institutions where the basis for lifelong learning are set up and developed. In terms of teaching/learning process teachers in modern classrooms are no longer lecturers, they are facilitators whose main task is to organise the teaching/learning process accordingly and act as managers of this process. It is a totally new role for the teachers which involves the management of the process which is:
- challenging,
- important,
- and never boring.

Accordingly, teachers must change their way of thinking and accept that the traditional understanding and functioning of teaching/learning process where teachers' primary responsibility and activity have been directly instructing students and acting like the purveyors of knowledge and students – the recipients is not successful any more. In this kind of learning context students will not be able to

construct their knowledge and manage their own learning if teachers do it for them. If teachers determine what is important for students to know, the way how they should know something and how they should learn it, then students cannot become constructive learners. Having analysed contemporary litereture about teaching and learning, the authors of this article come to the conclude that it is very essential for students to act as intentional knowledge constructors and construct their own meaning for the world. Teachers' roles then shift from handling knowledge to helping students construct more tenacious conceptions of the world.

Hattie (2009) argues that not all teachers are effective, not all teachers are experts and not all of them have powerful effects on students. People live in a rapidly changing society full of challenges, opportunities and demands where new patterns of work and new business practices have developed and, as a result, new kinds of workers, specialist and experts with new and different skills, are required. And this is very important for education as well. And no matter if teachers want to call themselves 21st century educators or not, they are definitely not the same teachers as they were last century, and if somebody thinks he still did not change than he needs to look for another job in another field.

Howard et al (2011) consider that meaningful learning will result when learners are engaged in:
- knowledge construction, not reproduction
- conversation, not reception
- articulation, not repetition
- collaboration, not competition
- reflection, not prescription.

The same idea was expressed by Ausubel (1963) when he wrote about the learning theory. He believed that learning new knowledge relies on what is already known. That is, construction of knowledge begins with observation and recognition of events and objects through concepts students already have and they learn by constructing a network of concepts and adding to them. Ausubel's theory also focuses on meaningful learning because according to his theory, in order to learn meaningfully, students must relate new knowledge to relevant concepts they already know. It is interaction of new knowledge with already existing learner's knowledge structure. Ausubel contrasted meaningful learning with rote learning and stressed that knowledge stored during meaningful learning is fundamentally organized differently than knowledge learned by rote, and affective associations are also different.

Medel-Añonuevo (2001) asserted: "Today in the 21st century, we find ourselves anew amidst the loud voices proclaiming the importance of lifelong learning. What is clear is that the context of lifelong learning has changed and the utopian and generous vision hitherto characterizing lifelong learning has now become a necessary guiding and organizing principle of education reforms. It is recognized today as an indispensable tool to enable education to face its multiple current and emerging challenges" (p. 1).

Lifelong learning has several definitions. It is defined as learning pursued throughout life; flexible learning that is diverse and available at different times and places, etc. Delor (1996) has worked out four 'pillars' of education for the future:
- learning to know,

- learning to do,
- learning to live together, and with others,
- learning to be.

In other words, all those pillars make the framework of 'learning to learn' what is of an extreme importance of both teachers and students – it is teachers should promote and help their students to develop this and in students turn it is essential to be aware of the skill's 'learning to learn' need and necessity because the primary responsibility for learning is the learner's.

Gerver (2012) says that he as a parent expects his children's schooling to prepare them for the challenges of the future and to help them develop the skills and behaviours that will see them flourish in the middle of the twenty-first century and beyond. As he further explains that "the issue is not that we have generations of children who don't want to learn, the problem is that they don't want to learn when they can't see the point of the learning" (p. 21).

Fadel (2012) says that teachers need to have the time and flexibility to develop knowledge, skills, and character, while also considering the meta-layer – the dimension that includes learning how to learn, interdisciplinarity, and personalisation.

It leads to the question if learning is a process or a product? As Novak (2011) says: "over the past 30 years there has been major advances in our understanding of human learning. Behavioral psychology that dominated education for more than half a century began its demise in the late 1970's and pretty much collapsed in the 1980's. Almost all competent educational psychologists have moved toward cognitive rather than behavioral models of human learning" (p. 3).

There are various definitions of a term *process*, for example "a set of actions, changes, or functions bringing about a result", but in fact these explanations of a term 'process' mainly refer to business. When talking about a teaching/learning process, the authors of this article define it as 'a systematic implementation of related actions in order to reach some result'. Accordingly the result or product is students' higher-order skills, for example "4 C's" of Creativity, Critical thinking, Communication, Collaboration.

Methodology

The pilot research was conducted with the aim to find out Latvian teachers' views about the significance of managerial skills in their work. For school selection the regionality principle was observed, specifying the school location (urban/rural), the number of students, teachers' qualification, local government support, the language of institution, school results in the state tests, etc. 288 teachers from 25 schools of Latvia took part in the questionnaire.

In order to evaluate opinions on the following skills:

1) *classroom management* (discipline, organizing teachin/learning process, emotional/psychological/physical environment),
2) *cooperation with parents*,
3) *development of students' skills*,
4) *evaluation of students learning outcomes*,
5) *cooperation with colleagues*

teachers were asked to score the significance according to their understanding and experience (5 – the most important; 1– the less important).

There are a lot of discussions concerning the shift of educational paradigm. In fact this shift has already been made but if it happened at teachers' work at schools – the question is open. No doubt, it is very crucial to be able to manage a successful teaching/learning environment. Different theoretical sources articulate the art and science of teaching/learning as essential knowledge, skills and qualities. For example, Connecticut State Department of Education has worked out The Common Core of Teaching (2010) where six domains are stated:

1) *content and essential skills* (teachers understand and apply essential skills, central concepts and tools of inquiry in their subject matter or field),
2) *classroom environment, student engagement and commitment to learning* (teachers promote student engagement, independence and interdependence in learning by facilitating a positive learning community),
3) *planning for active learning* (teachers plan instruction in order to engage students in rigorous and relevant learning and to promote their curiosity about the world at large),
4) *instruction for active learning* (teachers implement instruction in order to engage students in rigorous and relevant learning and to promote their curiosity about the world at large),
5) *assessment for learning* (teachers use multiple measures to analyze student performance and to inform subsequent planning and instruction),
6) *professional responsibilities and teacher leadership* (teachers maximize support for student learning by developing and demonstrating professionalism, collaboration with others, and leadership) (p. 4).

Latvian teachers were asked to rank five managerial skills according to their significance in teachers' work and the results were the following:

1) *development of students' skills* (29,86%)*,*
2) *classroom management* (discipline, organizing teachin/learning process, emotional/psychological/physical environment) (24,65%),
3) *evaluation of students learning outcomes* (17,36%),
4) *cooperation with parents* (15,97%)*,*
5) *collaboration with colleagues* (12,15%)*.*

Having compared these results with the theoretical background of a contemporary teaching/learning process, we can conclude that all five managerial skills the teachers of Latvian schools consider inessential. For instance, a lot of authors argue that interdisciplinarity is of a high importance when implementing effective teaching/learning, but Latvian teachers ranked 'collaboration with colleagues' as a skill of less substantiality. The authors make a conclusion that the teachers in schools of Latvia are not aware of the role and necessity of managerial skills in their everyday work with students, what proves that the negotiations about the change of educational paradigm last for decades but the implementation of it is far from the practical teachers' work. In order to improve it, teacher training programs and in-service courses should be developed and adapted to the demands of contemporary society.

Conclusions

1. The change of educational paradigm has occurred, but the implementation of it in teachers' work is still open. The teacher's role goes well beyond information giving and acting as a lecturer. New educational paradigm includes all those dimensions which are mentioned by Sahlberg (2011) when he talks about alternative educational policies.

2. In order to implement a new educational paradigm in schools and classrooms, teachers first need to change their way of thinking.

3. One of the challenges for the schooling today is meta-layer (learning how to learn, interdisciplinarity, systems thinking, personalization, etc.) dimension which is essential for developing lifelong learning habits because learning takes place not only in schools but it is also social issue, but the results of the research showed that the teachers are not aware of the need and importance of managerial skills and they are not ready to shift from the traditional understanding of a teaching/learning process to that one of a student learning centred.

4. In order to make teachers realize themselves as managers, it is necessary to develop teacher training programs and in-service courses. It should lead to a change of teachers' way of thinking what in its turn will come to the educational paradigm implementation in schools.

5. It is necessary organize courses and seminars, learning teams in order to encourage teachers for interdisciplinary collaboration, cooperation with parents and society.

6. Such managerial skills as *development of students' skills, classroom management* (discipline, organizing teachin/learning process, emotional/ psychological/physical environment), *evaluation of students learning outcomes, cooperation with parents, collaboration with colleagues, etc.* should be developed.

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IN-SERVICE TRAINING PROGRAMMES FOR INCLUSIVE EDUCATION IN SERBIA – OFFER AND IMPLEMENTATION

Abstract

The initial education and in-service training of all educators, particularly teachers, play a vital role in strengthening competences necessary for implementing inclusive educational practice. This paper analyses offered and implemented in-service training programmes for educators in the field of inclusive education or, more precisely, for working with children with disabilities in the period 2012-2014. The findings of the analysis indicate that the programmes aimed at all categories of children with disabilities are prevalent; most of the programmes address teaching and learning strategies and are intended for various profiles of educators at different education levels; approximately three quarters of the offered programmes were implemented. The paper also tackles unresolved issues about strengthening competences for implementing inclusive practice.

Key words: inclusive education, in-service training programmes, Serbia

Introduction

As part of the education reform taking place in Serbia since 2002, the education authorities prioritised the wider access to education and the creation of conditions for providing quality education for all students. Inclusive education is adopted as a concept which can contribute to the achievement of these goals and as an approach ensuring that the needs of all students in the mainstream education system are met and all children are provided with the opportunities to learn and prepare for life.

The principles of inclusive education in Serbia have been enshrined in the legal regulations since 2009. Apart from the general principles defining the equal right to quality education for all individuals, the Law (Zakon o osnovama sistema obrazovanja i vaspitanja, 2009) also defines specific procedures and measures ensuring the conditions for unhindered learning and development of children/students: provision of additional support to those needing it; individual education plans; adaptation of the achievement standards; removal of physical and communication barriers; introduction of pedagogical assistants; changes in the modes of financing institutions supporting the inclusion of children into the education system, etc. (Zakon o osnovama sistema obrazovanja i vaspitanja, 2009).

The implementation of inclusive education in Serbia started in the school year 2010/11. Following the introduction of the inclusive practice, schools and teachers were faced with different demands and changing roles. Teachers, as the key actors in education, are expected to have competences related to understanding and accepting individual characteristics of students as well as creating adequate conditions for learning and social participation for all children.

This paper provides the analysis of in-service training programmes for educators in the field of inclusive education, more precisely, programmes aimed at working with children with disabilities. While choosing this group of children we had in

mind the fact that until the introduction of inclusive education, teachers in Serbia rarely had the opportunity to work with this category of children and were therefore faced with an entirely new experience.

Teachers' competences for working in inclusive settings

The initial education and in-service training of all educators, particularly teachers, play a vital role in strengthening competences necessary for implementing inclusive educational practice. However, it seems that there are certain difficulties in this segment of the education system in Serbia, which is supported by the results of numerous studies conducted in the last few years. The majority of pre-school teachers, class and subject teachers think they are not adequately prepared to work in inclusive settings and that they are not sufficiently trained to provide students with disabilities with adequate support in learning and social participation (Đerić & Pavlović, 2011; Gašić Pavišić & Gutvajn, 2011; Gutvajn, 2014; Procena kapaciteta i potreba učitelja za razvoj inkluzivnog obrazovanja, 2010).

Such results come as no surprise given the fact that the topic of inclusive education is not adequately addressed during the initial education of pre-school teachers, class and subject teachers. For instance, the analysis of the study programmes intended for class teachers showed that in the majority of cases there was only one course relevant for inclusive education (which is most frequently related to the work with children with disabilities and which predominantly employs the so-called "defectology" (medical) approach) and that there is no cross-curricular approach to inclusive education (Macura-Milovanović, Gera & Kovačević, 2011). The results of a comprehensive study carried out at the time of the introduction of inclusive education corroborate these findings and indicate that barely half of the teachers (out of 811) had a special course at which they acquired knowledge about how to work with children with disabilities and that only one sixth of them think they received adequate knowledge for working with these students (Procena kapaciteta..., 2010). Besides, almost half of the examined teachers had no training in this field but still most of them expressed the readiness and the need to develop professionally, particularly addressing the topics such as individualisation in the teaching process, the developmental characteristics of children with disabilities and individual education plans.

The situation with subject teachers is even more critical since their initial education takes place at the faculties devoted to a particular academic discipline where the share of teacher training courses is generally very small. It was not until 2012 that teachers became obliged to attend courses providing the minimum of 30 ECTS credits from psychological-pedagogical and didactical-methodological fields and 6 ECTS credits from practical training.

Alongside initial education, in-service training is a segment of professional development of educators that should lead to the development of competences for inclusive education. The results of the studies conducted in the past indicate that regardless of the field addressed within in-service training, there are certain problems when it comes to attending seminars. For instance, in the course of in-service planning, the needs of the educators the professional development programmes (seminars) are intended for are not adequately met (Marinković, 2010, as cited in Kundačina & Stamatović, 2012); the approach to the addressed problems

is generalised; the interests of the seminar participants vary; financial means are scarce, and so on (Kundačina & Stamatović, 2012). Consequently, similar difficulties can be expected in this segment of in-service training aimed at working with children with disabilities.

Important changes in Serbia in the field of the professional development date back ten years, when attending at least 100 hours of in-service training programmes within five years became mandatory (Pravilnik o stalnom stručnom usavršavanju..., 2004). In the meantime, the new Rules have introduced certain changes such as the obligation of educators to obtain 120 points (hours) of professional development, more precisely 100 points for attending accredited programmes and 20 points for participation at professional meetings (Pravilnik o stalnom stručnom usavršavanju..., 2012).

Following an open competition, the Institute for the Improvement of Education accredits professional development programmes and publishes them in the *Catalogue of Professional Development Programmes for Teachers, Pre-school Teachers and School Support Staff.* In the beginning the Catalogue was published every year and since 2012 every second year. The Catalogue is the official material based on which educators select of in-service training programmes (seminars) they want to attend. Educators rarely apply individually for attending of in-service training programmes but seminars are usually organised for all school staff. Local governments (municipalities) are responsible for financing in-service education and training. However, due to the harsh economic conditions in the country, in-service training financing is fraught with difficulties, which prevents educators from selecting those programmes which suit their personal professional needs or the needs of the school they work at.

Characteristics of in-service training programmes for working with children with disabilities

The analysis of in-service training programmes for working with children with disabilities has been undertaken in order to study their characteristics. The analysis covers the programmes accredited for the school years 2012/13 and 2013/14 (Katalog programa..., 2012). We have chosen to analyse the programmes from these school years because they were the most recent ones and because this Catalogue currently offers the greatest number of programmes for working with children with disabilities (6.99%).

The data were collected using the content analysis technique, while the content analysis protocol was relied on as an instrument. Several units of analysis were extracted: the percentage of programmes for working with children with disabilities in the overall number of accredited programmes; the target group of a programme in terms of whether its content refers to working with children with various kinds of disabilities or children with a single disability; the educators the programmes are intended for; the timeframe needed for a programme to be carried out. The description of a programme in the Catalogue was treated as a unit of context; in other words, it served as a whole within which the abovementioned units were analysed.

Programmes for working with children with disabilities have been included in every issue of the Catalogue of Professional Development Programmes in the past

ten years, between the school years 2006/07 and 2015/16. The share of programmes aimed at working with this category of children in the overall number of accredited programmes ranges between 3.6% and 7%, in different school years (Zavod za unapredjivanje obrazovanja i vaspitanja, 2015). The percentage of these programmes in the total number of accredited programmes has obviously seen a continuous increase of about 1% on an annual basis over the period between 2009/10 and 2014/15 (which, however, stagnated in the 2011/12 school year). Moreover, the findings show that the percentage of such programmes in the overall number of accredited programmes has ranged between 6% and 7% in the period between 2010/11 and 2014/15. The said trend can be accounted for by the following factors: the legislative changes which were introduced in 2009 and which have helped underpin the inclusive approach to education; the introduction of this approach to schools in 2010; the fact that in the 2010/11 school year the Minister of Education set down priority areas for professional development over three-year periods, inclusive education being one of the priorities.

With regard to how general a programme is – whether it is aimed at all categories of children with disabilities or only children with a single disability – the findings of the analysis indicate that there are twice as many general (48) programmes compared to the specific ones (22). An in-depth analysis of the content of the general programmes has made it evident that they encompass a wide range of various issues. Among the most frequent ones are the following: legislation; general tenets of the inclusive approach; stereotypes about inclusive education; characteristics of children with disabilities; pedagogical profiles of students, individual education plans; teaching and learning strategies; cooperation with parents and other stakeholders. Among specific programmes the prevailing ones are those intended for working with children with various learning and behavioural disabilities and difficulties such as dyslexia, dysgraphia, dyscalculia, hyperactivity, attention disorders as well as children with autism.

Considering the target group, the accredited programmes for working with children with disabilities are intended for educators at all levels of education. Namely, of the total of 70 accredited programmes, most of them are intended for educators working in primary schools (68), followed by educators in pre-school facilities (50), secondary schools (39) and adult education schools (15). All the programmes cater for different profiles of educators (70).

The largest number of programmes for working with children with disabilities last for two days (33), while fewer programmes last one day (26). There were fewest programmes which take three days to be carried out (11).

Over a two-year period, between the school years 2012/13 and 2013/14, 380 seminars addressing children with disabilities were conducted in Serbia. These were attended by 9,458 educators. By way of comparison, there were 3,600 attendees over the period spanning 2006, 2007 and 2008 (Ministarstvo prosvete, 2008). This means that there has been an almost threefold increase in the number of the educators who have attended these seminars in the past two years.

Of the 70 programmes for working with children with disabilities, which were on offer in the Catalogue of Professional Development Programmes for the school years 2012/13 and 2013/14, 54 were carried out at least once, while 16 programmes were not realised at all. It should be noted that the number of programmes carried

out was higher in the given two-year period than the number of programmes which were on offer in each of the past ten years (the exception being the Catalogue published for the 2011/12 school year). The frequency of carrying out individual programmes varies considerably. The greatest number of programmes were realised up to five times (34): once or twice – 10 and between three and five times – 24. Twenty programmes were carried out more than five times, while 12 programmes were carried out more than ten times. The most frequent programme was the one which was realised 29 times.

Considering the fact that most accredited programmes were carried out, it is not reasonable to expect that the characteristics of the realised programmes considerably deviate from the already mentioned characteristics of programmes. The findings of the analysis go to prove this to a great degree. Even if the analysis of the characteristics of realised programmes were limited to 12 most frequently realised programmes, in other words, those which have been carried out between 11 and 29 times in the last two years, no significant diversions from the already outlined characteristics are recordable.

Concluding observations

In the period between the school years 2010/11 and 2014/15 the number of in-service training programmes related to working with children with disabilities has been stable, varying between 6% and 7% of the overall number of in-service training programmes on offer for all fields. The programmes aimed at children with various kinds of disabilities prevail over the ones targeting children with a single disability. The majority of accredited programmes are intended for various profiles of educators at different levels of education. Three quarters of all of these programmes were carried out over a two-year period. The topics of the majority of professional development programmes in this field, both accredited and realised, are focused on learning and teaching strategies. Considering the fact that the results of empirical research indicate that potential seminar attendees (pre-school teachers, primary and secondary school teachers) hold these topics to be a priority (Kundačina & Stamatović, 2012), it can be assumed that in-service training programmes aimed at working with children with disabilities are, to a certain degree, consistent with the needs of those for whom the programmes have been designed.

However, a question can be raised as to why educators still think they have not been adequately trained to work in this area. There are number of possible answers. First of all, it is highly unlikely that the problems brought about by the quality of initial education can be entirely resolved through in-service training. Besides, regardless of the rich offer of programmes on various topics and with prevailing didactic content, it seems that the needs of educators in this field have to be further explored, as well as their satisfaction with the existing programmes on offer. Bearing this in mind, the existing programmes should be revised. Likewise, it is necessary to establish the directions along which new programmes will be developing. Furthermore, based on the analysis one gets the impression that there is more focus on getting acquainted with various challenges in working with children with disabilities than on developing the necessary skills for working in this field. And much as professional development provides one with the opportunity to choose programmes according to individual needs and interests, it is questionable whether

this really happens in practice given the problems of financing such types of professional development. Finally, the total number of the delivered seminars and involved participants does not provide an insight into involvement of individual participants by the number and sort of seminars. Further efforts in terms of raising the level of preparedness for inclusive education should be aimed at changing initial teacher education in line with the requirements of the inclusive policy and practice, as well as at ensuring an environment in which various forms of continuing professional development are available and supported.

Acknowledgments

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OBSTACLES TO SPECIAL EDUCATION FOR STUDENTS WITH INTELLECTUAL DISABILITIES IN TURKEY

Abstract

Turkey has regulations in place with regard to the special education of students with intellectual disabilities on the axis of international and national legal texts. However, the gap between law and practice cannot be denied. The existence of obstacles to special education for students with intellectual disabilities (ID) still continues in Turkey.

Brief Report

The major barriers to inclusive educational settings, such as inadequate educational infrastructure, overcrowded classrooms, lack of educational professionals and lack of collaboration among professionals, insufficient pre-service and in-service training programmes, as well as negative attitudes towards inclusion (Ciyer, 2010), are typically valid for Turkey as well as for other developing countries. However, in recent years, the main problem for students with ID in inclusive educational settings is the transformation from full inclusion to segregated settings within mainstream general education schools, even though full inclusion was highlighted in Article 23 of the Special Education Services Regulation of Turkey (SESRT, 2006, amended 2012). Research shows that in Turkey, students with other disabilities (e.g. visual, hearing, orthopedic impairments) are likely to be educated in regular classrooms with typically developing peers (Rakap & Kaczmarek, 2010; Ciyer, 2010). The number of students in special education classes has been increasing in the last two academic years (Ministry of National Education, MoNE, 2011/12; 2012/13). This situation is an indicator of a contradictory approach with regard to the Least Restrictive Environment principle in inclusive settings.

Turkey has enacted and signed a number of documents such as Education for All (UNESCO, 1990), the Salamanca Statement (UNESCO, 1994), Constitution Articles 10 (anti-discrimination) and Article 42 (Education For All), UNCRPD (2008), the Turkish Disability Act (2005, amended 2012) Article 3 and Article 41, Turkish Criminal Law Article 122 (anti-discrimination) in order to prevent discrimination in education. Therefore, antidiscrimination is a principle in accordance with the constitutional structure and educational goals of Turkey. However, the existence of some ethnicities cannot be denied in Turkish society. Nevertheless, there is no option when it comes to educating students with ID with the exception of the Turkish language within the constitutional framework. Constitution Article 42 bans the utilization of a different language in the Turkish education system, including special education.

The assessment and placement process involving students with disabilities who come from different ethnicities and languages has been controversial for many years (Rhodes, Ochoa & Ortiz, 2005). For example, the assessment of students using their native language was passed into law by the U.S. Congress under the Education for All Handicapped Children Act (1975). This law has now been upgraded as IDEA

mandates the assessment and diagnosis process in a nondiscriminatory manner. Notwithstanding all efforts to clear away the barriers to education for all in Turkey, the assessment of students with disabilities including different ethnicities, is performed only with regard to the Turkish language. When considered from this point of view, absolute nondiscriminatory evaluation is not mentioned. Even though the nation-state centred Turkish citizenship is based on a single religion (the Sunni sect of Islam) and a single language (Turkish), and this has been questioned since the 1980s, especially during the 1990s (Bezmez & Yardimci, 2010), saying that everybody has to be assessed using their native language is very optimistic in terms of the current structure of Turkey, in terms of its educational infrastructure and constitutional body. In Turkey, students with ID are diagnosed through educational assessment reports provided by Guidance and Research Centres (GRCs) which are the only authorized institutions offering diagnostic services for students in need of special education. These reports are based on the DSM-IV-TR criteria (APA, 2000) and in this respect the diagnosis process has been conducted in an unbiased manner, but without taking into account language differences.

Deinstitutionalization, full inclusion and schooling are highlighted in many legal texts as well as in the Special Education Services Regulation of Turkey (SESRT, 2006, amended 2012) as approved by Turkey as one of the stakeholders. However, there are still barriers to full participation, in that children with disabilities do not have the same opportunities to take part in educational settings as their typically developing peers. Schooling problem is one of the major barriers to full participation. Schooling problems of students with disabilities including students with ID have to be examined within three fields: schooling in formal education, schooling in inclusive educational settings, and schooling of girls with disabilities.

Initially, it was estimated that there were 1,105,630 individuals with special needs aged between 0 and 19 years in Turkey, and that 690,000 of those consisted of children with ID based on the ratio of individuals with special needs according to total population statistics in 2010 (Education Reform Initiative, 2010). National Education Statistics Formal Education (MoNE, 2012/13) reported that the numbers of school aged typically developing students engaged in formal (public) education was 15,239,702 whereas the number of students with ID was 212,701. The proportion of students with ID in formal education is just 1.39%. When both sets of statistics are considered, the delivered educational services for schooling of students with ID are chronically limited.

Secondly, as an example, in the U.S., 92.3% of students with ID aged between 6 and 21 were placed in inclusive settings, whereas a lower proportion was educated in segregated settings (National Center of Educational Statistics, NCES, 2009). In Turkey, there are currently 186,772 (37.68%) students with disabilities, most of whom are students with ID in inclusive settings (MoNE, 2012/13). Even though the number of students has increased year after year in inclusive settings, the national statistics for Turkey show that the number of segregated students with disabilities, including students with ID, is at a rate of 62.32%. Accordingly, segregation that has been intensively felt is still a fact of special education system of Turkey.

Thirdly, one of the most burning issues in Turkey is the lower standard of schooling of girls with disabilities including ID. The gender ratio is obtained by dividing the female gross schooling ratio by the male gross schooling ratio

multiplied by 100. The National Education Statistics Formal Education (MoNE, 2012/13) show that the gender ratio by educational year and level of education is 100.59% in primary schools and 102.94% in secondary (middle) schools for typically developing children, whereas the schooling ratio of girls in special education (formal education) is 62.39%. However, no research has been conducted on whether the low ratio of girls in special education is due to a higher prevalence of disabilities for male individuals, or due to the possible effect of cultural and religious factors as well as social indicators in Turkey.

Vocational education has also been questioned in terms of the lower employment ratio of individuals with ID. In the formal education system, currently 2,583 students with ID are educated in 172 special education training centres (grade III) and 6,096 students with ID are educated in 103 special education vocational training centres (ID-grade III) in Turkey (MoNE, 2012/2013). Although these schools have been established in order for individuals with disabilities to gain vocational skills before entering professional life (SESRT, Article 45(1)), the employment ratio of these students with ID is very much lower compared to the population with hearing, visual, and orthopedic disabilities. Companies are obligated to employ individuals with disabilities at a rate of 3% (in the private sector) and 4% (in the public sector) in accordance with quota regulations (Labour Law, No: 4857, amended 2008, Article 30), but many companies prefer to employ individuals with hearing, visual, and orthopedic disabilities rather than individuals with ID or are willing to pay a fine without employing any of the disabled population in Turkey.

Another obstacle to the full participation of students with ID in educational settings is poverty as an external factor. According to a World Report on Disability (World Health Organization, WHO, 2011), one of the main challenges to providing effective support services for parents of students with disabilities in developing countries is poverty that increases the risk of a poor quality of life (Dardas & Ahmad, 2014). A recent study revealed that 59.4% of 3,009 Turkish families of children with ID and autism are below the hunger threshold, whereas 95.7% of these groups are below the poverty line. In addition, almost half of such families have lower SES scores (45.8%) based on low educational and occupational scores (Meral, Cavkaytar, Turnbull & Wang, in press). Therefore, the parents of students with ID who struggle with poverty have limited access to disability-related services and special education services in Turkey as a developing country.

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COACHING PROCESS BASED ON TRANSFORMATIVE LEARNING THEORY FOR CHANGING THE INSTRUCTIONAL MINDSET OF ELEMENTARY SCHOOL TEACHERS

Abstract

This research aimed to develop coaching process based on transformative learning theory for changing the mindset about instruction of elementary school teachers. Tools used in this process include mindset tests and questionnaires designed to assess the instructional mindset of teachers and to allow the teachers to reflect on how they perceive themselves and their role as educators. Additionally, in accordance with the transformative process, guidance is provided to improve their instructional mindset.

Because validation and verification are an essential aspect of the transformative process, the tests and questionnaires that were developed have been reviewed by nine experts resulting in a validity of 97% and 81%. The feedback and recommendations from the experts was applied to the improvement of the tests, questionnaires and teacher's guidance. The revised material was administered to seventy elementary school teachers, resulting in reliability scores of 76%, 82%, and 87%, demonstrating the tests' ability to separate the strong and weak teachers.

Consequently, it was found that a coaching process based on transformative learning theory for changing the mindset in instruction of elementary school teachers, implemented within the context of the teacher's own place of work through learning experiences, thorough thinking, best practices, and teacher's interaction, allowed them to change their mindset which was evidenced in their behaviors.

Key words: Coaching, Transformative learning theory, Mindset

Introduction

A major factor influencing students' learning is teacher quality (Akiba & Letendre, 2010, pp. 2018-2022). However, according to a study titled Teacher Development for Quality Learning conducted under the Thai Educational Reform Programme by Queensland University of Technology in Australia (Queensland University of Technology, 2002, p. 49), it was found that Thai teachers lack required knowledge and capabilities, in particular, concepts, principles, and processes relating to new instructional and learning approaches. An important requirement for teacher development is to change beliefs regarding teachers' performance. According to the analysis of the causes of instructional arrangement problems, it was also found that teachers tend to resist changing their instructional arrangement. This is consistent with Sinlarat (2001) who stated that teachers still rely on traditional instruction where the teacher monopolizes an instruction session, thus failing to adhere to new paradigms which promote students' self-learning.

In terms of a teacher's instructional arrangement, a teacher's instructional method is one of the key elements. If a teacher is able to apply various methods of

instruction to satisfy the needs and interests of the students, it will help students to achieve learning objectives, encourage the teacher to use their most effective instructional arrangements resulting in good academic performance by the students (Koyta, 2003).

Therefore, instructional arrangement which is a result of a teacher's thoughts and reflection which targets skills and abilities that are consistent with the students' natural attributes will lead to the identification of guidelines that will improve subject matter selection, instructional management, and assessment. If this sort of teacher's thought processes are continuously developed, it will provide a teacher with knowledge and understanding in terms of their professional role as teachers and in relevant social contexts as well (Brown & Grills, 1999).

There are two types of mindsets; they are (1) the fixed mindset which refers to a person who believes that a person's basic attributes, such as intelligence and talents, are unchangeable, and (2) the growth mindset which refers to a person with a growth and changeable mindset who believes that all everyone's attributes are changeable due to efforts and accumulated experiences, such as a person's notions, beliefs, attitudes, values, and knowledge, depending on environment and society (Dweck, 2006). A teacher with a fixed mindset may obstruct instructional arrangement because a teacher will resist changing and adjusting his/her instructional arrangement behaviors (Goldstein & Brooks, 2007, p. 2). This is consistent with a study conducted by Thailand Development Research Institute in 2012, finding that education reform would be impossible to enhance students' academic performance if there is no change in teachers' instructional behaviors (Economics Research and Training Center, 2012, p. 48).

It is strongly recommended that teachers improve their mindset towards instructional approaches. Consequently, elementary school teachers with fixed mindsets are required to develop new approaches which will enable them to have a better instructional arrangement process. As teachers with fixed mindsets believe that students' successes are a result of their gifts which are unchangeable, they will tend to use the same instructional approach with all students, regardless of individual uniqueness. Students' performance will vary depending on the type of learner each student. However, teachers with growth mindsets believe that student skills can be developed with time as they continue to learn new things (Goldstein & Brooks, 2007, p. 2).

According to an aforementioned study, there was an interesting concept which can be applied to adjust teachers' mindset, which was coaching, an implementation to enhance and develop teachers with knowledge, skills, and personal attributes in achieving the desired target of successful learning (Joyce & Showers, 1988 cite Costa & Garmston, 2002, p. 38). There was also a principle focusing on coaches, which are herein teachers with fixed mindset, to coach themselves or to learn how to improve and develop their instruction by themselves through an interaction between a coach and coaches as a medium to encourage flexible thinking, development, and to eventually lead to self-creating knowledge (Costa & Garmston, 2002, p. 31). This is also a way to stimulate and encourage teachers to realize their true capabilities in instructional arrangement. It also leads to continuous and limitless self-development (Maskey, 2009, p. 63) which will allow the creation of new attitudes, thoughts and

beliefs leading to continuous improvement in instructional arrangement (Zwart et al., 2008, p. 993).

However, the adjustment of teachers' mindset based on coaching principle has not been completely concluded. Other theories must be introduced to explain teachers' internal change as only one factor cannot sufficiently detail teachers' internal changes and cannot be concluded whether things happening to teachers are a direct result of coaching. Therefore, the adjustment of teachers' mindset cannot be guaranteed to experience continual improvement without proper coaching. Additionally, the researcher studies transformative learning theory of Mezirow (1997), stating that learning refers to a process that a person interprets and translates experiences into personally meaningful experiences and applies the principles learned in a practical basic manner. In short, once a teacher receives coaching, he/she will thoroughly consider based on his/her existing experience and knowledge to seek for strengths and weaknesses of what he/she did in comparison with coaching. Then, he/she will assess and make a decision and pick the most effective approach for his/her self-development. As for the process of considering thorough thinking and expanding one's ability through this coaching interpretation, Mezirow (1997) called it frames of references, which are an aspect of the educator's point of view, thinking patterns, thinking framework, belief systems, thinking systems, conclusions, and expectations which influence realization and meaning provisions of several experiences. Mezirow (1997) explains further that such frames of references will affect interpretation process from the use of previous experience to create new experience as a self-guide. The introduction of the new learning skills and the cumulative benefits of applying the transformative processes of the learning theory will help teachers to continuously adjust their mindset even though there is no longer coaching because the mindset adjustment is resulted from teachers' thorough thinking and consideration based on learning processes to adjustment and not from coaching only.

According to above-mentioned background and reasons, the researcher is interested in developing coaching processes based on transformative learning theory for changing the mindset in instruction of elementary school teachers further to develop teachers with fixed mindsets to a mature one and to enhance instructional quality.

Objective: To develop a coaching process based on transformative learning theory for changing the instructional mindsets of elementary school teachers.

Research Methodology

In this study, a multi-instrument research and development (R&D) approach has been applied. This research is divided into following phases.

Phase 1: Research and evaluate the condition of teachers' instructional arrangement

1. Study on instructional arrangement of elementary school teachers**:** To study the conditions of instructional arrangement resulting from teachers' mindset and identify any problems or weaknesses by collecting data from documents and articles, and by observing teachers' instruction within the context of their own work environment. The latter was conducted by observing and evaluating the thoughts and views of forty teachers in 2012 at various schools within the province of Chonburi located in Thailand.

2. Study on relevant information, thoughts, and theories for data analysis and synthesis: To study notions regarding mindset and teacher mindset in relation to instructional arrangement from both domestic and foreign documents, textbooks, articles, and researches (Dweck, 2006; Goldstein & Brooks, 2007; Sung, Kang & Liu, 2004). It was found that there are two types of mindsets, including the fixed mindset and the growth mindset. The key finding is that the mindset in instruction of a teacher refers to a set of concepts that a teacher has towards other relevant people and instructional arrangement approach, rooted from their knowledge, experience, attitude, and belief.

In this regard, the mindset in instruction of teachers includes (1) mindset towards relevant people in relation to instructional arrangement which is a teacher's concept or set of concepts towards capability, intelligence, and competency of relevant people in terms of instructional arrangement, (2) mindset towards instructional arrangement which is a teacher's concept or set of concepts towards roles and responsibilities, thoughts, approaches, and guidance for instructional arrangement which is expressed as a teacher's behavior during his/her instructional arrangement in class which is influenced by the individual's mindset towards relevant people and his/her mindset towards instructional arrangement.

In terms of coaching, coaching is used for organizing learning activities to successfully achieve the desired goals, focusing on coaches (Blanchard & Thacker, 2004, p. 268; Knight, 2004, pp. 34-35) which are teachers herein, to be able to coach themselves or learn to improve and develop their instruction by themselves through interaction between a coach and them, as a medium to encourage thinking, development, and to lead to the creation of internal knowledge.

In terms of transformative learning theory (Mezirow, 1997), this theory defines that learning refers to a process that a person interprets or translates his/her existing experience into experience meaning and practical implementation. As for process in considering, thoroughly thinking, and expanding this coaching interpretation, it is called frames of references, which are an aspect of meaning provision, thinking pattern, thinking framework, belief, thinking system, mind conclusion, and expectation influencing realization and meaning provision of several experiences a person.

3. Determination of research framework: According to a study on condition and problem of instructional arrangement resulted from teachers' mindset and relevant documents and researchers, the researcher can define a conceptual framework for this research.

Phase 2: Research and development of coaching process based on transformative learning theory for changing the mindset in instruction of elementary school teacher

In this phase, the researcher processes data acquired from Phase 1 of the study to analyze as basic information to draft a procedure. The five steps are as follows:

1. Study and analyze data gained from Phase 1: The researcher synthesized principles of coaching process based on transformative learning theory for changing the mindset in instruction of elementary school teachers.

2. Determination of process elements: the researcher determined process elements by studying relevant documents and researches related to process development. Consequently, key elements of process include its principles, characteristics, contents, processes, as well as evaluation and assessment.

3. Determination of implementation steps: From the determined principles, the researcher determines implementation steps of the process which can be divided into 3 phases: preparation, implementation, and evaluation.

4. Drafting procedure manual: The researcher prepares a procedure manual including step-by-step activities that are in accordance with the objective of transformation and applies them to the coaching process. The coaching process and the manual are reviewed and verified by 5 experts in terms of validity. Consequently, it was found that procedure details and supporting documents had consistency index more than 0.50. All of the assessment items can be applied and coaching process can be revised as recommended.

5. Development of data collection tools: The researcher determines guidelines for developing tools in accordance with the research results as follows:

1) Tools used for collecting data regarding change of the mindset in instruction of elementary school teacher which was qualitative information. The tools were verified by 7 experts in terms of content validity and structure. All experts agreed on all questions and made some revisions on language used. The researcher revised accordingly and then used it for calculating Cronbach's Alpha to seek for reliability, including:

a. Mindset test: 4-level measurement questionnaires whether they are agreeable or non-agreeable at which certain level, including 20 questions. Reliability is equal to 0.76 with discrimination.

b. Teacher's instructional arrangement mindset tests:

- Mindset in instruction test: 5-level measurement questionnaires, including 42 questions. Reliability is equal to 0.82 indicating its ability to separate the strong from the weak teachers.
- Teachers' instructional arrangement guidance: behavioral assessment of teachers' performance in accordance with opinion items from the mindset in instruction test, including 30 questions with reliability at 0.87.

2) Qualitative tools including teachers' behavioral observation forms, individual interviews, self-assessment records, and teachers' learning logs.

Phase 3: Research for experiment of coaching process based on transformative learning theory for changing the mindset in instruction of elementary school teachers

The researcher applied such developed process (draft) to elementary school teacher for 1 semester to study and develop an appropriate process for implementation, as follows:

1. Determination of population and sample group: The sample group included 13 elementary school teachers: six from schools under the Office of the Basic Education Commission and seven from schools in elementary educational area 1 in Chonburi province. The experiment was conducted during the 2nd semester in 2014.

2. Experimentation of the developed process (draft):

a. Prepare a provisional process by studying and analyzing the preliminary information gathered from the sample group in the context of implementing educational institutions and by organizing meetings with school executives and teachers to coordinate and plan for improvements.

b. Follow steps under the provisional process. In this experiment, two coaches performed similar works but at different schools.

3. Data collection:

The data collected Includes information from Part 1 regarding implementation conditions as information for improvement and development of data collection by observation, field logs, interviews, and information representing the change of the mindset in instruction of the elementary school teachers.

4. Data analysis:

a. Analyze data for improvement and development by analytic induction to create conclusions based on data collection, as well as content analysis and data illustrations.

b. Analyze data from the processes, applications, and outcomes which contribute to the change of the instructional mindset of the teachers.

Phase 4: Improvement and development of coaching process based on transformative learning theory for changing the mindset in instruction of elementary school teachers (final)

The researcher assessed the change of the mindset in instruction of elementary school teachers based on their coaching process by using mindset tests and instructional arrangement questionnaires developed, as well as assessment from teachers' opinion interviews which serve as verification of the knowledge gained from their participation in the study. In addition, the teachers' thoughts and feeling during their participation in the study are taken into account. Based on the evaluation criteria, the researcher reports on the process and makes recommendations for improvements as specifications of outcomes in various areas.

Results

The developed coaching process based on transformative learning theory for changing the mindset of instruction of elementary school teachers had key concepts, principles, content, steps, and duration as follows:

Concepts

Coaching process from learning to change is a process in changing the mindset of instruction for teachers by learning through experience, thorough thinking, best practices, and interaction between teachers and relevant parties, causing teachers to change their mindset and expression into good behaviors under a coach's support in providing help and organizing activities throughout the learning process.

Principles

1. Mutual interaction between a coach and teacher, or a teacher and his/her peer will lead to teacher's learning.

2. Open-mindedness of the teachers to accept internal changes will create individual self-recognition by objective self-evaluation in order to assess both personal and professional outcomes and the reasons for them.

3. Creation of internal forces that push for internal change and an increase in teacher's motivation for learning leads to positive behavioral changes.

4. Problem solving by discussing past experience with others leads to new findings and improves a person's internal and external problem solving skills. It also provides an opportunity to learn how develop new problem solving techniques thus leading to internal change.

5. Self-direction to achieve desired targets for changing is resulted from self-thinking process which will lead to sustainable change. Therefore, change must

begin from one's internal feeling and habitually repeated until it gains acceptance and becomes regular practice.

6. Information exchange through mutual experiences leads to concrete solutions and practices.

Process characteristics

1. Learning and content activity

2. Group meeting

3. Coaching activity

4. Practical implementation

Content

Process content for elementary instructional arrangement includes elementary instructional arrangement, elementary student development, instructional approach learning theory, etc.

Process steps

There are 3 phases of process compliance as follows:

Phase 1: Pre-coaching

Prepare participants to create relationship between a coach and teachers for building up mutual trust between a coach and coaches and for knowing mindset base of participants by studying instructional arrangement condition of teachers and by observing instruction to determine coaching guidelines.

Phase 2: Coaching for learning

It is an implementation for promoting participants' self-internal change by having a coach to support without instructing or guiding the teachers, including 5 following steps: self-recognition, openness to new experience, self-comparative assessment, creating new mindset, and promoting new teachers' mindset and apply it to instructional arrangement. This is to allow teachers to immerse themselves in their working lifestyles, to encourage reflection, and associate it to their instructional arrangement and their entire life.

Phase 3: Post-coaching conclusion and evaluation

Make a conclusion how the implementation outcomes were and evaluate coaching based on the collected test once again to determine coaching guidelines further, as well as collect thoughts to synthesize lessons which will lead teachers to his/her desired target.

Process Duration

Coaching process can be done in parallel with work in terms of instructional context for approximately 16 weeks. Then, it can be continued further to create sustainable mindful change and to confirm the teachers' changed behaviors are derived from teachers' instructional mindset. Duration can be appropriately adjusted according to the teachers' institutional context.

Recommendations

1. Enhance teachers' self-reflection and motivation for internal change by posing appropriate questions.

2. Attentive listening and listening with interest will relax teachers. Teachers should listen carefully to understand other people's feelings. Teachers' thoughts or feeling should not be judged.

3. Positive language should be used, reflective opinions and creativity should be supported to provide useful aspects and thoughts and to attract participants to apply them to their own circumstances.

4. Creation of motivation and moral support is important to stimulate coaches with self-confidence in passing through obstacles of change.

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DEVELOPMENT OF A CURRICULUM MANAGEMENT PROCESS BY APPLYING LEAN CONCEPT FOR WASTE ELIMINATION TO ENHANCE CURRICULUM IMPLEMENTATION OF PRIMARY SCHOOL TEACHER

Abstract

This research aims to study and develop a curriculum management process by applying Lean concept for waste elimination to enhance curriculum implementation of primary school teacher. This study was conducted with a focus on qualitative data collection by dividing into 2 phases, including (1) analyze and synthesize relevant notions, theories, documents, and researches, as well as fundamental information used for developing a process, and (2) develop a curriculum management process by applying Lean concept for waste elimination, including 7 steps (preparation, value definition, value steam mapping, waste eliminations, flow implementation, pull reflection, and pursue perfection).

Keywords: Curriculum management, Waste in Education, Quality in Education, Lean Concept

Introduction

Developing institutional curriculum is a process requiring participation from all sectors, such as management, teachers, guardians, and communities. Its implementation can be generally divided in 2 parts, including (1) institutional-level implementation, and (2) class-level implementation. Consequently, learning activities or assignments for students, materials, or assessment approach may be adjusted to suit each group of students (Office of the Basic Education Commission, 2010).

People dealing with curriculum management and technocrats believe that curriculum management is curriculum director or manager's role (Ninwichien, 2005). However, the definition of curriculum management also covers instructional personnel required to be responsible in applying and modifying learning standard to design and develop a curriculum or program consistent with philosophy and goals of such curriculum. It is required to determine and develop a time frame for applying such curriculum, as well as to arrange continuous monitoring of such curriculum to be applied as framed and to help students achieve its determined objectives (Thongthew, 2010).

A teacher plays directly important role in developing students to grow up as quality citizen of the nation. According to research regarding school efficiency (Kyriakides et al., 2002), a teacher is a key factor resulting in students' learning development. It can be said that the quality of students' achievement significantly depends on a teacher. Teacher efficient in instructional arrangement will enable students to fully learn and develop themselves. However, regarding a report on curriculum use in Primary Educational Area 2 in Samut Prakarn Province, Thailand, in terms of problematic conditions, it is found that each teacher's instructional

arrangement is done individually. Educational standard has not been truly used for designing instructional management (Primary Educational Area 2 in Samut Prakarn Province, 2010). This overall creates non-directionally instructional management, lack of coordination, and lack of understanding on core objectives for each subject.

Primary-level instructional management in Thailand is consistent with the Core Curriculum Management for Basic Education 2008, focusing on standard and learning implementation, as well as application of knowledge assessment and evaluation by the central unit, the National Institute of Educational Testing Service (Public Organization) or NIETS. However, teachers do not share common under-standing and cannot develop an instructional plan in relation to all targeting aspects (knowledge, competency, and desired characteristics). The details are overlapping and do not cover all issues determined in the standard (Office of the Basic Education Commission, 2010).

An instruction focusing only on contents without truly considering instructional management's targets, assignments inconsistent with curriculum's targets, time wasting in repetitive instruction, inefficient resources use for Instructional manage-ment are all economically considered systematic waste which is consistent with educational waste defined by U.S Government Accountability Office (U.S Govern-ment Accountability Office, 2011) in a research finding 2 types of education wastes, including wastes from duplication & overlap, and waste from fragmentation. This is also agreed by Dewey (1990 [1902]) who stated that (1) students' development must cover all areas, including physical mental brain and emotional aspect so one-focused instruction may impede students from other areas of development causing waste and students' inability to develop in all areas determined for desired characteristics as preferred values, (2) waste caused by the inconsistency of educational management by subject in school and loss of students' capability to learn from reality displaying problems occurring in working process and requiring to be solved by reducing wastes in process and increasing work efficiency. According to relevant documents and researches, it was found that Lean concept is a management for waste and overlaps elimination to directly achieve targets and is the most responsive work to users in bringing their satisfaction (Peeravud, 2010).

Lean waste elimination was derived from Taiichi Ohno in 1978, studying companies' mistakes to reduce car production waste, so called Toyota Production System (TPS), and then was further developed by Shigeo Shingo in 1981. Although Lean started from car production, its concept has been well applied to service system, particularly within an organization with customers-oriented value. Consequently, Lean has been widely used in various globally leading organizations (Ziskovsky & Ziskovsky, 2007). There are 5 Lean's key concepts, including identify value, map the value stream, create flow, establish pull, and seek perfection. It is flexible and adaptable to each organization's specific needs for curriculum management in various ways.

As one of service businesses, Lean waste elimination was firstly introduced to educational sector in 2004, from higher education institutes. There was a research regarding the application of lean waste elimination for production to each process within several organizations (Balzer, 2010). In addition, Flumerfelt (2008), a professor from Oakland University in Australia, conducted a study supporting that the introduction of Lean waste elimination to educational institutes is possible

because Lean focuses on system and process development. In Thailand, Lean waste elimination has been widely applied in various types of business but its concept has never been applied to educational system.

Objective: To develop curriculum management process by applying Lean concept for waste elimination to enhance curriculum implementation of primary school teacher.

Research Methodology

Phase 1: To study, analyze, and synthesize notions, theories, documents, and research, including basic information regarding curriculum management process and lean waste elimination concepts, in order to develop process which consists of 3 steps: study of waste resulted from the application of curriculum by primary school teacher, study of notions regarding efficiency of curriculum application, and application of notions passed through analysis and synthesis to create curriculum management process based on Lean waste elimination concepts.

Phase 2: To verify the developed curriculum management process by having 5 experts: 2 in curriculum management, 2 in educational institute management, and 1 in Lean waste elimination concepts, and using a form to evaluate process appropriation to see relation and accuracy in terms of contents.

Phase 3: To finalize curriculum management process based on process appropriation evaluation form and expert's recommendations.

Result

1) Study results show that the way that a teacher put curriculum into practice was not consistent with curriculum's objectives, potentially causing waste in 2 periods of time, including when developing learning management plan and when putting it into practice.

2) According to results from the verification of curriculum management process based on Lean waste elimination concepts by 5 experts by using process appropriation evaluation form to see consistence and accuracy in terms of contents. Notion, principles, objectives, work processes, and duration can be presented as following final procedures.

Notions

Curriculum management process based on Lean waste elimination concepts is a process to effectively apply curriculum, by focusing on goals determined by the Core Curriculum Management for Basic Education 2008, students' quality and local contents in each educational area, institutional curriculum targets, as well as target set for each instructional arrangement, considering consistency in all work processes to minimize waste. Waste caused during curriculum application takes place in 2 periods of time, including when developing learning management plan and when putting it into practice. Consequently, the determination of person in charge for managing waste when having group work is required for continuous collaboration and improvement to efficiently apply curriculum or put it into practice most consistently and achievably.

Principles

Curriculum management process based on Lean waste elimination concepts to enhance efficiency of curriculum application consists of the following principles.

1. Recognition of the importance of target-oriented implementation based on goals set for each time of instructional arrangement by thoroughly considering each process to minimize waste.
2. Determination of concrete and clear target must be simple, measurable, achievable, reasonable, and trackable.
3. Development of value chain is a concrete process allowing relevant parties to see clear picture overall in order to share common understanding on targets.
4. Implementation process-by-process includes activities consistent with instructional arrangement target which are value-creation activities, and activities inconsistent with target are non-value creation where such kind of process must be eliminated.
5. Searching for waste must focus on process itself, not on person.
6. Determination of a group of persons in charge must be appointed from a group with relationship to build shared responsibilities and to seek for approaches to improve responsible tasks.
7. There is no limit for efficiency enhancement process. It must be gradually and continuously implemented in cycle to seek for better approach at all time.

Work processes

Curriculum management process based on Lean waste elimination concepts includes 7 steps.

Step 1: Preparation
Preparation is a process to determine strategy and structure to support changes into management by applying Lean waste elimination concepts, and to develop a team including team building and training to gain knowledge and capabilities in correctly and effectively applying curriculum management process based on Lean waste elimination concepts. Key characteristics of team are relationship and shared responsibility. One can become a member of more than one team and several teams can work concomitantly. Determination of a team with relationship can be made from teachers mutually responsible for the same subject matter, the same class, or the same project.

Team training can be divided into 3 phases including pre-trial, trial, post-trial phase.

Step 2: Value Definition
Academic management committee of an educational institute mutually identified needs for curriculum application under curriculum management process on the basis of SMART: Simple, Measurable, Achievable, Reasonable, and Trackable. There were following sub-processes:

1) Academic management committee mutually identified needs showing efficiency of curriculum application based on information of the core curriculum for basic education, guidance for student quality evaluation from external quality

assessment, institutional curriculum, identity and uniqueness of each school, as well as community's and relevant stakeholders' needs.

2) Academic management committee took needs for verification and adjusted them as needed for curriculum management.

3) A teacher verified target set for instructional arrangement based on SMART principles.

Step 3: Value Steam Mapping

The creation of value chain is to create overall work plan by Curriculum Manager or Lean Master, responsible a role as leader, whereas a teacher is a performer. Sub-processes are as follows:

1) Draw a flow chart based on target per hour set.

2) Analyze current work in comparison to all targets per hour whether they are consistent and cover all targets of institutional curriculum.

3) Analyze should there be any inconsistent and missing target which is considered implementation waste and must be improved further based on Lean waste elimination.

Step 4: Waste Elimination

Waste elimination was determined to seek for waste within a work plan and waste obstructing the value chain from achieving the determined targets, covering the following sub-processes:

1) Seeking for waste: a team collaboratively seeks for wastes by applying familiar and appropriate approach.

    a. Analysis under 5 WHYs principle to analyze a root of waste by continuously asking "why" until cause of problem is apparent.

    b. Visual control is the use of observer's eyes to find wastes within implementation processes and then to write them down one-by-one.

    c. Brainstorming is to analyze wastes by using group work which must collaboratively think and analyze from real practices whether any process or step is valuable (NA) or non-valuable (NVA).

2) Division of waste: a team cooperatively considers and divides found wastes for division, as follows:

    a. Divide wastes into resolvable (MUDA Type I) and non-resolvable (MUDA Type II) waste.

    b. Take educational resolvable wastes for dividing into 7 sub-groups: Excess Processing, Over Production, Not utilized employee, Using more assets, Unwise use of time, Duplication and Copying, and Fragmentation.

    c. Identify waste elimination approaches whereas Curriculum Manager must provide advice to a team by applying questioning techniques and ERCS:

E = Eliminate   (Eliminate unnecessary process, content, or student's task)
R = Rearrange (Rearrange instructional steps and contents)
C = Combine   (Compile steps, contents, and student's task together)
S = Simplify   (Make steps, contents, and instructional management approach simple and easy to understand).

Putting plan into practice (Hoshin Kanri) is to draw abstract picture into more apparently concrete plan with the verification whether a plan is concrete and practical, whether it will lead to target achievable at its completion, whether there would be any adverse outcomes.

Step 5: Flow Implementation

This step is to put instructional arrangement plan into practice. This plan is considered valuable as it tends to be applied to satisfy the desired goals with minimum wastes. In doing so, there are relevant parties, including teachers or plan users and instructional observers in the same team as plan users. This is also to verify whether plan users followed the plan and the real practice produced any other wastes during the use of such plan or not. Then, the observations will be used as information for discussion, review, and reflection further.

Step 6: Pull Reflection

This step is to review work in which a team will have a meeting, consultation and reflection session by analyzing steps of putting them into practice as sub-processes. In addition, a team will collaboratively whether in such processes there are any remaining waste affecting target achievement or not. If any, a team will pursue Kaizen to eliminate such wastes and to improve instructional management to have unlimited increase of efficiency, such as time reduction, resources elimination, quality enhancement, or increase in number of targets.

Step 7: Pursue Perfection

In this step of value creation, all Kaizen projects will be integrated as organization results to bring success occurring in each step as working standards. There will be knowledge sharing and success cases compilation to be further used as concreate working standards.

Process timeline

Curriculum management process based on Lean waste elimination concepts can be concomitantly implemented. One can be a member of several groups. A period of first round must be equal to period set by a group (Takt Time), covering 4 weeks. Further, step 3-5 will be continuously implemented for 4 rounds in total to determine standard value. Then, standard values will be compiled for summarizing as overview of procedures. The total period taken for all procedure will include 20 – 24 weeks. However, the period can be adjusted as appropriate based on each educational institute's context. Also, the period taken can be varied based on the level of difficulty of objectives determined by each educational institute.

Conclusion and Recommendation

Curriculum management process based on Lean waste elimination concepts is a research and development. Therefore, once final procedure passed quality verification by experts, it can be further practiced by primary school teacher, both in private schools or schools under the Office of the Basic Education Commission of Thailand.

The result shows that, in terms of potential waste elimination, there were several principles and notions which were consistent and can be combined for developing

curriculum management process based on Lean waste elimination concepts in 7 steps: preparation, value definition, value steam mapping, waste eliminations, flow implementation, pull reflection, and pursue perfection.

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Part 3

Education Policy, Reforms & School Leadership

GILLIAN L. S. HILTON & HELEN TYLER

SCHOOL LED TRAINING: AN EXAMINATION OF THE SCHOOL DIRECT RECENT POLICY INITIATIVE IN ENGLAND MAKING SCHOOLS LEADERS IN THE EDUCATION OF TEACHERS

Abstract

The School Direct training initiative has had a marked effect on the production of new teachers in England. The role of university education departments has been curtailed, and the belief that learning from doing, is better than a more theory based approach has caused politicians to radically change teacher education processes. Challenges are also being experienced by schools and other training establishments. Long term effects are as yet unclear, but already the programme has resulted in the closure of some university departments of education and concerns that school mentors do not have the expertise to provide the depth of subject and educational theory required by trainees, or sufficient knowledge of education research. There are questions too about the variation in the quality of provision in those schools and consortia undertaking this new type of training. At present the major concern seems to be that this change could severely affect teacher supply.

Key words: teacher training, school direct teacher training, school-led training, teacher shortage

Introduction

The training of teachers in England has undergone a process of dramatic change over the past twenty years, whilst the requirements to become qualified to teach have moved from a competences approach, to a standards approach, changing four times over the past fifteen years. Government policy has shifted towards training in the school environment, with the mentor as a key figure in this process. This into-school movement, begun under previous governments, culminated in the expansion of school-based training, for example the Graduate Teacher Programme. The most recent change is to *school-led* training via the School Direct Programme, introduced in 2012 (Harrison, 2012). This change, the Government believes, gives an opportunity for schools to influence the way in which Initial Teacher Training (ITT) is delivered and therefore will ensure that the best potential teachers are recruited to the profession. The change is a response to the demand from schools for greater control and influence over the training of teachers, so as to allow schools to recruit

and prepare trainees for the subjects and phases needed. However, it has been a controversial initiative, as university departments have, to some extent, been side-lined (Elmes, 2012; Ward, 2014), as the then Secretary of State for Education, Michael Gove, embraced the idea that training at the feet of a practising teacher was of more value than the theory, he asserted, was fed to trainees by left-wing university tutors (TES, 2010). This echoed previous Conservative governments' suspicions of what trainee teachers were taught and how relevant this was to the classroom (Chitty, 2009). This distrust had arisen in the 1970s and become a hegemony for the political right-wing, supported by publications that came to be known as 'The Black Papers', which complained about left-wing 'scruffy' teachers, who were heavily influenced by university thinking. This viewpoint was even supported by some Labour politicians and many parents, who were themselves influenced by adverse reports of schools, common in the right-wing press at the time.

Teacher Training in England: the changing landscape

Training to teach in England is a complex process. Until recently, most training has been undertaken by higher education establishments who have, over several decades, begun to work more closely with schools in partnerships. Prospective teachers received input from tutors in higher education, designed to develop subject knowledge and an understanding of pedagogical approaches. Additionally, they were being introduced to current research, whilst schools provided practical experience in a real situation (Universities UK, 2014).

During the 1990s and the early 21st century, massive changes took place, namely:

- The introduction of school-based ITT routes, working alongside higher education such as the Registered Teacher Programme and the Graduate Teacher Programme.
- Establishment of routes to teaching such as the Post Graduate Certificate of Education (PGCE) and Bachelor of Education (BEd).
- Teach First, recruiting highly qualified trainees from top universities into the profession for a limited time with the possibility of quick promotion. Training is a brief six weeks and the trainees then go into 'problem' or 'under-performing' schools, mostly in inner cities.
- School-centred ITT (SCITT), which metamorphosed into school-*based*, and has recently, with the introduction of School Direct, become school-*led,* with the focus on the training within the school environment, and therefore on the mentors within that environment.

With this recent initiative there has been an increase in the amount of time the students spend in school while they are training, and a marked decrease in the time spent in university (or with other providers such as SCITTs), who provide the theoretical input. Concerns have been expressed over the swift introduction of School Direct training (Ward, 2014) and questions asked as to whether schools have the time, or expertise, to provide adequate theoretical background, the ability to support students in the exploration and application of research evidence, or the undertaking of personal research in order improve their practice. This, it appears, is a marked feature of what are considered as the world's best performing school systems (BERA/RSA, 2014). Critics have attacked the lack of adequate planning in

the rushed introduction of the School Direct scheme, for example, Tatlow (in Richardson, 2013a) in her evidence to the House of Commons Education Select Committee, suggested that School Direct had been introduced without consideration for its effect on teacher supply. The Universities Council for the Education of Teachers (UCET) has criticised the large reduction in training places offered to elite universities, where much education research is carried out, and the resulting possible demise of their education departments (Ward, 2014).

Previously, in the late 19th and early 20th centuries, the pupil teacher approach had been a popular way of training new teachers, that is, learning at the feet of a 'master' and copying that person's approach. This 'apprenticeship' scheme relied heavily on the quality of the teacher, which was seen as the major weakness in this method. As a result, there began a move into the Higher Education academic route for ITT. Gardener (1993) suggested that the weakness of this approach was that trainees had a lack of practical in-class experience. Cope and Stephen (2001 in Haggar & McIntyre, 2006) however, point to the increasing inclusion of the use of practising teachers in university teaching teams, in an attempt to relate theory more closely to practice. In the 1990s the PGCE became the most popular way of training teachers, but this was also criticised for its lack of true collaboration between schools and university education departments. However, this element considerably improved with the use and training of school mentors who liaised with HE tutors. There was, however, a clear divide between the theory taught in universities and the practice supervised by mentors, so there has been pressure for theory to become more practice-related and Spendlove et.al. (2010) believe that lately, theoretical pedagogical knowledge and concepts are being overwhelmed by the need to prioritise practice in the training. Wenger (1999) describes the two competing providers of training as separate communities of practice, which Edwards and Mutton (2007) point out creates tension between HEIs and schools. However, Darling-Hammond (2006, p. 300) claims that we have learned what we need to include in a successful training programme, namely

> … tight coherence and integration among courses and between course work and clinical work in schools, extensive and intensely supervised clinical work integrated with course work using pedagogies that link theory and practice, and closer, proactive relationships with schools that serve diverse learners effectively and develop and model good teaching.

Whether School Direct training is providing this balance is questionable, as Darling-Hammond's 'course work' element, i.e. the theoretical background to action in the classroom, seems to be disappearing at a rapid rate. Further causes for concern about the *school*-led approach are that teachers may lack up-to-date subject knowledge to pass onto trainees and that they are not sufficiently research aware, so as to encourage trainees to read, apply and conduct research in the classroom in an attempt to improve practice. UCET has consistently raised concerns about the lack of teacher involvement in research and the BERA/RSA (2014, p. 30) interim report on its role in teacher education stated this as one of its conclusions:

> ... there now needs to be sustained emphasis on creating 'research-rich' and 'evidence-rich' (rather than simply data-rich) schools and classrooms. Teachers need to be equipped to interrogate data and evidence from

different research sources rather than just describing the data or trends in attainment.

The question therefore must be asked, can schools and mentors equip trainees with these skills?

At the centre of this latest initiative is the mentor, who guides and directs the potential teacher towards the achievement of the government's required standards. The quality of those mentors is paramount for all trainees, but even more so when training is led by schools. Darling-Hammond et al. (2002) researching teacher's feelings about their preparation, found that those in traditional teacher education programmes felt better prepared for their role than those trained in alternative programmes, or those who were untrained. This finding does not arise from a study of school-led training, but introduces a note of caution, which at present the political class has failed to acknowledge, in their ideological push to side-line the role of higher education in the preparation of teachers. Certainly it is essential that mentors observing trainees do not revert to their 'default' model as illustrated by Johnson's study in 1994 (Haggar & McIntyre, 2006). This study offered an insight into the internal struggle that teachers have in teaching in a style reflecting their beliefs, and the model learnt for trainee teachers to observe. This raises the question of how mentors can be trained within the school situation to demonstrate and discuss with trainees a variety of teaching methods, not only the ones with which they themselves are comfortable. How well prepared these mentors are to use research and also, to undertake research in/on their own classrooms also needs to be questioned, as this underpins quality teaching. England, unlike many other countries, has not been pro-active in the education and training of new teacher educators. There is an assumption that teachers can change from working with children to teaching students how to do the task, without any input from their employer. Similarly in schools, although mentors receive training, it is not clear if teachers are being sufficiently prepared to fill the dual role of teacher and teacher educator, added to the many other pressures they are faced with in the English classroom.

In addition to the above questions about the quality of mentoring, there are concerns that giving schools larger numbers of the allocated training places for new teachers could cause a drastic fall in the supply of new teachers in schools. The BBC reported in 2013 that only two thirds of these school allocated training places had been taken up and that, at the last minute, universities had been asked to cover the short fall (Richardson, 2013b). Elmes (2013a) also underlined the drop in numbers allocated to university training, a 12.8% reduction from the previous year. Sheffield University for example had suffered cuts of 76.2% over the past two years and Cumbria University was contemplating cutting staff due to a large drop in allocated numbers (Elmes, 2013b). As this allocation of training places to schools was raised again in 2014, there are now serious concerns that a shortage of teachers could be looming, for example in 2013 design and technology recruited only 48% of its target and computer science only 57% of the required numbers. However, the decline in allocations of training places for the School Direct route to universities has been further underlined at the beginning of 2015 as further places have been offered to SCITTs and to school based consortia, but not to higher education institutions. UCET's response has been one of disbelief, as all the evidence shows that universities are better at recruiting trainees than are schools and SCITTs. This move

appears again to be a considered attempt to wrest teacher education from higher education and place it with school based groups, with little evidence that this will produce better teachers, or even more importantly, fill areas of serious shortage (Elmes, 2015). Professor John Howson of Oxford University has raised serious concerns about the ability of the School Direct programme to recruit sufficient teachers to fill the country's need, particularly in areas such as physics and design and technology. If things did not improve, a possible serious crisis in teacher supply could occur, especially in the south-east of England. Howson believes this is partly caused by schools being more selective in choosing potential trainees than are university departments of education, acceptance rates being lower for School Direct applicants, around 16% compared to around 19% for university based training programmes (Morrison & Ward, 2014). Recent reports in the press have also indicated that in addition to financial losses for universities, whose training place allocations have been so severely cut, schools are now finding that, despite investing, with government encouragement in the creation of a consortia of schools to control training, in some areas, allocation of School Direct places for 2015 has been drastically lower for some school and training groups. THES, News (2014, p. 10) reported that partnership groups of schools had been allocated 4 places, having requested 20, making non-viable the newly created infra-structure and staffing they had, at the behest of the government in its desire to move training into schools, been established. In the same report the National College for Teaching and Leadership (NCTL), it was claimed, had been accused by Professor Strike Vice-Chancellor for Cumbria University as having a 'Byzantine approach' to the allocation of places as it appeared that if School Direct partners put in a reasonable request, based on sound information, the response was drastic cuts in allocated training places, whilst those who had bid wildly for great increases in places had been more successful. Howson, (2014, no page) suggests that every teacher needs the following: (author's brackets)

1. Knowledge of what they are teaching that is continually kept up to date; (could be called subject knowledge).
2. Knowledge of how to teach and assess the outcomes of what they are teaching; (pedagogy).
3. Knowledge of those they are teaching and what these learners bring to the learning process; (understanding how children develop and the context of learning).

Howson believes that point number 3 is the most neglected element in teacher education at present. Examining the School Direct approach against these points proves interesting, as research with trainees and mentors has shown that trainees are worried about a lack of comprehensive input on subject knowledge, whilst experienced teacher educators are concerned about the inconsistency of the provision now on offer (Hilton &Tyler, 2015).

Conclusion

Courtney and Little (2014) strongly criticise the deregulation of teacher training, claiming that neo-liberal philosophies adopted by some countries and the subsequent devaluing of teachers has not led to a rise in achievement, or in lessening of the effects of social class and parenting. These authors call for the retention of training based on pedagogy, rather than on ideologies with little evidence to support them.

The OECD 2012 PISA report stresses that the most successful school systems have a strong focus and investment in teacher training and within that system the role of the universities is essential to ensure quality (Paton, 2013). Universities UK (2014) has drawn attention to the fact that this school-led trend in England is not popular elsewhere, particularly in countries whose schools perform well in Pisa tests. In addition the report raises serious concerns over possible teacher shortages in the coming years, particularly in subjects such as science, maths, engineering and technology. Further concerns are about inconsistencies in quality and a lack of underpinning of practice by essential theory, particularly specific subject knowledge and research. It is already clear that universities are beginning seriously to question whether they have any future in teacher education and some have already taken the decision to withdraw from any further involvement. If this trend accelerates, then it may prove impossible ever to resurrect the partnership between schools and higher education for educating teachers. This would surely be to the detriment of the quality of teachers trained in England and also to the amount of research on teaching and schools undertaken. At least now the NCTL has realised the potential recruitment problems facing schools and training organisations. A request was issued on 21st January 2015 by them for providers to, not only bid for the development of flexible programmes, but also for fast track places to address the need for chemistry, computing and D&T teachers in secondary schools. This is aimed at individuals unable to commit to a full time course due to family/caring commitments or have other part-time working / volunteering commitments who would benefit from part-time training opportunities (NCTL, 2015) However, this approach could appear to be again an unconsidered response to a problem they have created and whether this 'fast track' approach will be successful in recruiting and retaining teachers remains to be seen. At present we appear to be turning in a complete circle in regard to how we train our teachers in England, though history demonstrates clearly that the apprenticeship approach failed in the past, and despite the provision of mentors and input from partners on education theory and research, we are in danger of going backwards and creating a problem entirely of our own making.

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GILLIAN L. S. HILTON & HELEN TYLER

SCHOOL LED TRAINING: AN INVESTIGATION INTO THE NEW SCHOOL DIRECT INITIATIVE FOR TEACHER EDUCATION IN ENGLAND, THE EXPERIENCES OF TRAINEES AND TRAINERS

Abstract

This paper presents research undertaken with trainees, mentors and tutors who are associated with the new School Direct initiative in England. Introduced quickly in 2012, this was a new way of training teachers which is seen as school-*led*. That is, schools, not higher education institutions, are the leaders of this programme and in many cases universities have been cut out of the process of training teachers. The change has had serious implications for schools, education departments in universities and trainees. This research, with primary sector trainees, attempted to discover the views of recent and current trainees, mentors in schools and tutors from programme providers. Though at present the research is small and focussed on the primary phase, some serious issues have arisen including the theoretical content of the programmes and the mentors' ability to underpin practice with educational theory and subject knowledge and to use the government's qualified to teach standards correctly.

Key words: teacher training, school direct, mentors, subject knowledge, school-led

Introduction

Following the coalition government's initiative introducing the School Direct Programme (SDP) of teacher training in 2012, there was a rapid move of government allocated training places, from university programmes into schools, which are grouped together in consortia or under the guidance of a School-Centred Initial Teacher Training Provider (SCITT). Some universities have become involved in working with the school partnerships and SCITTs, in order to deliver some of the required theory and to support mentoring in schools, but their role in teacher education is rapidly declining. A great deal of concern has been expressed about this move by education researchers and universities, as within high performing systems the move has been against in-school training, towards a more university research-based education (BEA/RSA, 2014; Swain, 2014). Kelly (2015, p. 30) in part blames universities for the problem, due to their 'spineless acquiescence to government policy'. As in most previous programmes of Initial Teacher Training (ITT), of whatever type, the SDP needs to be underpinned by scholarship, integrating educational theory with practice. Teacher educators, wherever they are based, need to ensure that the trainee teachers develop a high level of skills, knowledge and confidence, whilst also supporting the trainees in educational research activities. The question for school-led training is: will mentors have the time or expertise to engage the trainee in the level of reflection and scholarship necessary to produce high quality, outstanding teachers? Previously, concern had been expressed about the quality of mentoring of trainee teachers in school-based programmes (Brookes, 2007) and in the SDP much more is required of mentors than was previously the

case. Quality is judged by Ofsted inspecting schools against a set of government standards and prospective teachers are assessed against them and have to comply with these standards before qualified teacher status (QTS) can be awarded. The Cambridge Primary Review, (Alexander et al., 2010), the outcome of research conducted by Cambridge University into the condition and future of primary education, pointed out that there has been a tendency in ITT to represent teaching as merely the ability to acquire and use a narrow set of practical skills, leading to teachers becoming acquiescent followers of accepted methods, rather than exercising professional judgement to select the best approach to teaching. Certainly, all those involved in training teachers, acknowledge that in order to promote children's learning, trainees need to have access to a large body of knowledge on which to base their teaching efforts, including subject knowledge and pedagogical theory. Darling Hammond (2000a in Fullan, 2007, p. 273) identified six common features of ITT programmes:

- A common, clear vision of good teaching that is apparent in all coursework and clinical experiences;
- Well-defined standards of practice and performance that are used to guide and evaluate coursework;
- A curriculum grounded in substantial knowledge of child development, learning theory, cognition, motivation and subject matter pedagogy, taught in the context of practice;
- Extended experiences (at least 30 weeks) which are carefully chosen to support the ideas and practices presented in coursework;
- Strong relationships, common knowledge and shared beliefs among school and university based faculty;
- Extensive use of case study methods, teacher research, performance assessments and portfolio evaluation to ensure that learning is applied to real practice.

It has been interesting to examine the School Direct approach against this list. In addition, a list of 'what every teacher needs' was presented to the Carter review of primary education (and publicised in his widely followed blog) by Professor John Howson (Howson, 2014, no page). These included knowledge (up-to-date subject knowledge), knowledge of how to teach and assess the outcomes of what they are teaching (pedagogy), and lastly child development, an area that Howson believes has been the most neglected one in ITT programmes in the last thirty years and is now included in the Carter Review suggestions (Carter, 2015). This report also stresses that behaviour management, evidence-based teaching techniques, assessment and special educational needs should also be addressed and more subject knowledge included.

The one year SDP has a number of features not observed in the varied, previously established teacher education programmes in England. These features include the idea of bringing schools together to form a partnership under a teaching school (though SCITTs had long been established), whose role it is to bid for training places from the government and provide support and training to mentors in schools. In some cases SCITTs, teaching schools and universities provide experienced tutors, who visit the schools and observe and advise students, as well as providing theoretical input, generally in a central location. Schools employ trainees

as unqualified teachers during their training year and in many cases pay them a salary. (In this research those still in training, or who have recently qualified, are called trainees or NQTs (Newly Qualified Teachers) so as to distinguish them from qualified teachers).

The idea behind the programme was to attract well-qualified graduates with three to four years career experience (Ratcliff, 2014). Concurrent with the SDP introduction a new set of Qualified to Teach Standards (QTS) was introduced by the government (the fourth change in fifteen years) and this has had a serious impact on the role of the mentor (DfE, 2011). The Carter Review recommends that yet a further modification to these standards is necessary. Mentoring has been a common feature of school based training for many years, but now, in SDP, the role of the mentor has been reconceptualised, with the focus on mentors becoming the key figures with responsibility for much of the school-led training. It is essential therefore that mentors are prepared for and supported in this new role, as doubts had previously been expressed as to the efficacy of the preparation of staff in schools for mentoring (Hobson & Mallderez, 2002).

The School Direct initiative reflects government thinking that college and university courses were too theoretical and academic and that trainee teachers needed more experience to enable them to meet the demands of professional practice in the classroom (Harrison, 2012). At the heart of this innovation is the mentor, within the school setting, a crucial instrument in trainee improvement. Miller (2002) elaborates on this idea, stressing that we need to understand the complex linkages between:

- a person's knowledge, skills and attitude
- academic performance and personal life
- motivation, performance and achievement
- career aspiration, self-esteem and self-confidence.

Mentoring as a role within the school not only benefits the mentee and the mentor; Child and Merrill (2002) explored the transferability of mentoring skills to other aspects of school life and work, proving that the staff as a whole, and in turn the children's learning, benefited hugely.

The research

This research involved a variety of providers of the SDP and included trainees from a SCITT and school consortia and was concentrated on the early years and primary phases. A mixed methods approach for data collection was chosen, questionnaires for all trainees and the SDP NQTs, to obtain information about details of the programme and semi-structured interviews with four of them to explore attitudes and beliefs. In addition, three tutors were interviewed and a group of mentors at training sessions provided details of their beliefs about, and attitudes towards their role in SDP training. Trainees were being prepared for a variety of key stages at infant and primary level from the Early Years Foundation Stage (EYFS) (1), EYFS/Key Stage (KS)1 (4), KS1 (2), KS1/2 (12), KS2 (3). In other training routes, most trainees are prepared for two age levels and some of the trainees on SDP were not happy with training for one stage only, though all SD trainees have several weeks experience in a contrasting school and with a different key stage from the one in their host school. This is part of the programme requirement.

Research results

Three NQTs already qualified via SDP and nineteen trainees completed questionnaires; twenty females and two males, reflecting the female makeup of the primary school teaching force. Ages varied, three (1 male) were between 21 and 30, three were in the 31-40 age group, six in the 41-50 group (1 male) and one in the 51 – 60 group. This reflects the different makeup of SDP trainees from those on PGCE programmes who tend be in the younger age groups. The ethnic makeup was mainly white, eighteen women and both men, plus one Black African and one Asian woman. Nineteen of the group were receiving a training salary, three were programme only (unsalaried) and the salary question was important to several, as they had been previously employed in the school as learning and teaching assistants or stressed that the need for a salary (ten respondents) was one of their reasons for choosing this route into teaching. Six had already been working in the school in which they received training; ten thought training in school was better than via university and eight, that work–based training best suited their learning style. In the interviews NQTs and trainees supported the idea that in-class training was a good way to become a teacher. The amount of time allotted to theory (subject and educational) differed. Responses varied between four to seven hours, with two saying ten hours. This reflects the different approaches of the providers and included, in some cases, set tasks to be completed in trainees' own time. Four trainees only had theory input at their host school, five at SCITT premises, twelve at a different school from their host school and one at a variety of schools. Thirteen found the theory input very useful, eight quite useful and one of little use. Interviews with trainees and tutors and trainees' questionnaire responses raised doubts as to whether the theory input was sufficient. One tutor, who had great experience of other training programmes, stressed that QTS gained on the SDP is not a highly academic qualification and that he had to been forced to alter his philosophy and stop worrying about the deficit, as he saw it, of theoretical input on the programme. Respondents were asked to indicate from a list what areas had been included in the theoretical input. It was interesting to see that every trainee ticked behaviour management, thus demonstrating current government and Ofsted concerns. However, one noted that most of his problems in his host school were caused by a lack of a clear school behaviour policy, so it was difficult to apply his learning in practice. The next areas which were ticked most often were child protection, differentiation, special educational needs and using ICT. Worryingly, learning theories, child development and lesson planning scored lower, around 58% of trainees ticking these areas whilst subject knowledge scored slightly higher. Educational theory, ideas about different teaching methods and assessment theory scored only a 40% response and concerns were expressed by tutors and some trainees about the lack of input in these areas, leaving trainees relying on what they saw demonstrated by teachers and mentors in the classroom. One tutor summed up this deficit 'students on this programme learn 'how' to do things, rather than 'why' they are being done in that way'. The SDP delivered by the SCITT had stopped grading theoretical work giving pass or fail only, as a strategic focus on the theory did not feature in the award of QTS. He was also concerned about the low input of education research in the programme, (only 54% of trainees responding yes to a question asking if research featured in the theoretical input), feeling that it echoed

government beliefs that teaching is a skill not an academic exercise. However, one trainee spoke about the amount of research that was mentioned in the theory sessions she had received and how she had been trained to reflect and use action research herself. This demonstrates the variability of input from the different providers of training. Several trainees commented on the low status of theoretical input, but many were satisfied and even pleased as they were 'not expected to do essays'. One interview respondent thought the balance between theory and practice was right as learning 'on the job was best'. Equality issues, working with parents and interview techniques appeared to be of low importance, the latter understandable as most would find employment in their host, or a partnership school.

Meetings with mentors, senior staff and tutors, were extremely variable in number. Some mentors gave feedback daily, others weekly, or in one case only six times in a whole year. Over half of the trainees considered their mentoring good to excellent, 18% rated it as average to fairly good, but worryingly 18% also rated it as poor. Those who had effective mentors praised them in questionnaire and interview responses for their willingness to demonstrate good practice and their flexibility towards the trainee and their needs. However, not all comments were positive, two interviewees in particular criticising the quality of mentoring they had received, one finding that the mentor disregarded the needs of the training course and limited the time she was allowed to teach alone. She felt her ideas and contributions undervalued and that her mentor showed little interest in her development, rather using her to cope with an impossible work load. She did however find the training received from other areas of the course good. One NQT explained that without the support of the visiting tutor he would have left the programme as he and his mentor had little rapport. Tutors expressed concerns about the variability of mentoring, feeling some did not understand the role and were employing a 'deficit model', looking for what trainees were doing wrong. This, therefore raises questions about mentor training and Miller's (2002) perceptions of the complex role of a mentor do not appear to be addressed, in many cases, by these teacher educators, due in part, to time pressure on mentors and how they are selected (seniority appearing to be the main criterion, rather than suitability for the role). Some trainees/NQTs remarked on this, feeling that the choice of mentor had for them, not been successful and that, in the school, there were better and more helpful members of staff who could have fulfilled the role. Some mentors, it appeared, had been made to undertake the role and the amount of training they received and time give to them to carry out mentoring was very varied. It became clear from these discussions with mentors that some did not have the requisite knowledge and confidence to apply the teaching standards in practice, on occasions misinterpreting some of the standards and some were not using the latest versions. In a training session, out of twelve mentors, using a scale of 1-10 (where 10 conveyed great confidence in applying the standards) over half respondents recorded scores of 5 or below. As, in some cases, mentors are the main assessors of trainee performance against the standards this give rise to concern.

Some trainees/NQTs met school senior staff regularly, but over 50% had never had input from a senior member of staff. Input from a visiting tutor from a lead school, a university or a SCITT was more varied but 32% had no such input, which left many relying solely on in-school feedback. One visiting tutor expressed serious concerns over this, as the question must be asked; have mentors and school staff the

time or experience to be the sole judge of teaching standards? On occasions mentors were not using up-to-date versions of the standards which are, according to one tutor, 'very complex as, to cut down the numbers of standards to be met, several had been placed under one heading'. A trainee could be really good at one part of a standard, but in need of improvement in another area, making assessment difficult. Support and input from visiting tutors in school and during theory training was considered excellent by those who were fortunate enough to receive it, but several commented on the pressure on students and staff to cover all that was needed, as such a small amount of time was given over to this, around of four to five hours a week in term time.

When asked how well they had been prepared for the teaching role (having been given a list of areas that have to be addressed), most considered that they were very well, or quite well prepared in most areas, apart from how to assess children's work. This raises concerns about trainees perception of teaching, that is, they appeared in answers to the questionnaire and in interviews, to see teaching being about the acquisitions of skills not knowledge. One trainee, felt very well prepared to teach as she believed 'the best way to learn new skills is by practising them' and she would have 'been very frustrated if confined to a lecture room for part of the year'. However, one tutor expressed concerns about the limited time spent in other schools by these trainees, compared to those on other training routes. This lack of variety of experience, especially for those who are training in a school they have worked in for some time, could lead to a limited perception of how to use different approaches to teaching and learning.

Conclusion

These are early days for the School Direct initiative, but already some serious concerns have arisen. The lack of a theoretical base by which teaching and learning should be underpinned gives cause for anxiety. When judged against Darling-Hammond's (2000a in Fullan, 2007, p. 272) common features of ITT programmes, there appears to be a lack of emphasis on a clear vision of good teaching, a curriculum grounded in substantial knowledge, including child development, the shared beliefs between schools and universities and the lack of in-class research. The areas that are compatible are well defined standards of practice, as these are set by government (though not always well understood by mentors), and the idea of extended practice (though mostly limited to one school). The role of mentors and their training is also an area that needs to be developed, as many teachers are not well prepared for the role, especially as they are now centre-stage in the training process. SCITTs and universities do provide mentor training, but the diverse nature of the SDP leaves too much of this to chance and the idea that teaching is based on skill development, not knowledge, is one that is to be deplored. It is doubtful if mentors or even visiting tutors, with very limited time at their disposal, can fully prepare trainees to become well-informed, research-led teachers. In competition with the rest of the world, it must be asked if the UK government is making this training programme initiative from a soundly researched base or merely from a strongly held ideology which is unsupported by research, or evidence from history, or from other successful countries. As Kelly (2015, p. 30) suggests, is 'England on the way to turning initial teacher training into an international joke at the very time

the government is trying to raise the status of teaching in the eyes of parents and children'?

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TEODORA GENOVA

CURRENT SITUATION AND REFORMS MAKING WAY FOR FUTURE POSITIVE DEVELOPMENTS IN THE NATIONAL EDUCATION SYSTEM OF BULGARIA: AN OVERVIEW

Abstract

This paper on the education system of Bulgaria is aimed at presenting its structure, current situation, problems and challenges that it faces, and on-going reforms leading to some positive trends in the development of the national education sector. At the moment of writing this paper in the year 2015, we will mark the 1160th anniversary of the first Slavic alphabet, which was designed by the two brothers Saints Cyril and Methodius in 855 and was based on Greek characters that in its final Cyrillic form is still in use as the alphabet for modern Bulgarian, Russian and a number of other Slavic languages (Encyclopedia Britannica, 2015). With the accession of Bulgaria to the European Union in 2007, the Cyrillic alphabet became the third official alphabet of the EU adding intrinsic value to truly multilingual Europe.

Key words: Bulgaria, development, education system, reforms, structure, teaching

Introduction

We pay profound respect for the two brothers Saints Cyril and Methodius, who are called the "Apostles of the Slavs" for influencing the religious and cultural development of all Slavic peoples across Europe. They were two Byzantine brothers born in the 9th century in Thessaloniki (modern Greece) who became prominent Christian missionaries. During their mid-ninth-century missions in Bulgaria and Moravia, they devised an alphabet known as the Cyrillic alphabet. The creation of a written Slavic language enabled Slavic peoples to organize complex political structures and develop sophisticated traits of thought. Due to the Orthodox writing and literature in their own language, a powerful Christian Bulgarian state was built in the Medieval Ages.

The Commemoration Day of the founders of the Cyrillic alphabet is marked nation widely each year on 24th May with the participation of pupils at all levels in the school system of education together with university students in festive parades. Undoubtedly, no one could imagine the modern system of education in Bulgaria without the legacy of Saint Cyril and Methodius. I would suggest that at the time when globalization and internationalization are irreversible trends in the development of education systems around the world, there are still given "local", unique country's domestic characteristics that stand out in the national context.

The main aim of the paper is to present the structure of Bulgarian system of education including briefly all aspects of it. In addition to that, the issues of governance and financing of education, current problems and challenges to the system of education, and ongoing reforms and policy developments will be discussed. An attempt will also be made to find how the implications of the key elements "quality of education, social justice and accountability" are expressed in

the national context. To what extend do these three elements determine the success of the Bulgarian education system?

Overall National Education Strategy

The total number of all school pupils according to the International Standard Classification of Education (ISCED) enrolled in the education system in 2013/2014 is 1,020,542 including the number of pupils enrolled in private education establishments (NSI, 2014). The total number of all university students at both state and private universities for the same period is 283,294 (ibid). The system of education provides for the acquisition of the basic foundations and principles of human knowledge; the formation of universal human and national values, virtues and culture; the development of the individual and stimulating artistic talents and gifts; providing possibilities for needs and interest development for lifelong learning leading to self-development. Restrictions and privileges based on race, nationality, gender, ethnical and social origin, religion and social status are not tolerated. Education is secular and compulsory up to 16 years of age pursuant to the Constitution of the Republic of Bulgaria. Education is free at all state and municipal schools.

Governance and Financing of Education

The governance of the national education system is centrally managed by the Ministry of Education and Science (MES), which is a specialized body of the Council of Ministers for the administration of education. The administration of school education is organized on four levels: national, regional, municipal and school level. The centralized type of education governance finds expression in some of the following characteristics systematized by Popov (2014, p. 155): MES exerts control over the activities of all kinds of schools and servicing units; approves the textbooks for each school grade and each school subject, issues decrees, statutes, regulations, methodological requirements; approves school curricula and syllabi that have to be followed by the schools. The regional inspectorates of education are structural bodies within MES and perform governmental policy and control at regional level, but have no regional autonomy. The school system possesses other distinctive traits, which add to its slightly decentralized character. Popov (2014, pp. 155-156) points out some of them, for example the right of the school principals to appoint teachers on their own; to make changes and additions to the curricula after they have been approved by the regional inspectorates of education; to independently operate with the delegated state budgets.

To add to its centralized character of governance, the education system remains predominantly state funded in a way that nearly 87% of the funding is ensured by the state budget (BEU, 2014). The second source of funding in education is from EU funds in the form of national co-financing and European grants with the largest share of private spending concentrated at the higher education level. The main aim of the state policy is supporting a financial system that encourages and stimulates the educational development. The execution of the financial policy unites two major approaches in financing: it provides all educational institutions with the minimum finances for covering their expenses and suggests more resources to be invested

where there is an already optimized network with all the necessary material, organizational and methodological conditions for a quality educational process.

According to Eurydice most recent data on education, the country currently spends 4.2% of its GDP on the education sector. This percentage is quite low compared to the developed EU countries, which spend, for example 7.9% (Denmark), 6.8% (Sweden) and 6.7% (Cyprus) (Eurostat, 2014). However, the percentage of the GDP spent on education in Bulgaria has been slightly increased over the last four years, as follows: 3.5% (2012); 3.7% (2013); 3.8% (2014); 4.2% (ibid).

Structure of the Education System of Bulgaria

1. Early Childhood (Pre-School) Education (ISCED 0)

Pre-school education is managed by local authorities, and is not part of the State's responsibilities, between the ages of 0 to 3. Small children aged between 0 and 3 attend nurseries or nursery groups at kindergartens. Between the ages of 3 – 6/7 it becomes part of the responsibilities of MES. The system of pre-school education includes children from the age of 3 to the age of 6/7. The main goal of pre-school education is to ensure the child's development by using educational interaction. The ultimate aim of the kindergarten is to offer the necessary conditions for the development of each child's abilities and to make them ready for school. Besides the state-funded sector, which is prevalent, the private sector is also developing. Kindergarten attendance is optional from the age of 3 to the age of 5. The 2002 Amendment Law of the Law on National Education (1991) introduced compulsory preparatory groups for the children at the age 6 to 7 years. The 2010 Amendment Law of the Law on National Education extended the age for compulsory preschool attendance for the children aged 5 to 7 (BEU, 2014).

2. Integrated Primary and Lower Secondary Education (ISCED 1-2)

Within the structure of Bulgarian education, primary and lower secondary education are integrated into a single structure. Basic or single structure education (grades 1-8) includes primary (grades 1-4) and lower secondary (grades 5-8) schooling. Pupils begin school at the age of 7 in the year when they complete their seventh year of age or earlier, when they are 6 years old at the discretion of their parents, provided that their children are physically and mentally ready to start school (Law on National Education, amended 1998, Article 7 (2)). Basic education can be acquired at state, municipal or private schools. All schools are coeducational. Basic education can be acquired at primary schools (grades 1-4), lower secondary schools (grades 5-8) or secondary general schools (grades 1-12). On completing their grade 7 after sitting national standardized tests, students can enroll at vocational or specialize in a particular field of studies schools, where they finish their basic education and move on to upper secondary education. Successful pupils receive a certificate at the end of grade 4 for completion of the primary stage of education and grade 8 for completion of basic education, which entitles them to continue further their general upper secondary or vocational education and training (Law on National Education, amended 1998, Article 23).

3. Upper Secondary Education and Post Secondary Non Tertiary Education (ISCED 3-4)

Secondary education is single-staged (upper secondary/high school education), lasting 4 or 5 years and leading to completion of secondary education. It is acquired

on completing grade 12. For those students who want to go further with their education it also includes successfully taking state matriculation exams. It is certified with a diploma of completed secondary education, which is final and entitles the holder to continue their education or vocational training. In case students decide not to sit for state matriculation examinations, they are issued a certificate of completed upper secondary education, which, however, does not entitle them to university enrollment. Upper secondary education can be general (offered at general and specialized study courses schools) and vocational. General upper secondary education is acquired at general schools (with a course of study of 4 years) and specialized schools (with a course of study of 4 or 5 years). Students are admitted to specialized schools after completing grades 7 or 8 and successfully passing entrance exams. Upper secondary education provides the attainment of the general education minimum and, whenever possible, profile-oriented training in accordance with the State Educational Requirements. Educational courses for vocational technical schools of 2-year duration studies are offered after completing basic education.

4. Vocational Education and Training (VET) (ISCED 3-4)

Secondary vocational education assures acquisition of secondary general education and acquisition of a qualification in a profession from the List of Professions for Vocational Education and Training in compliance with the national educational standards for acquiring qualification in professions. Vocational education and training at secondary stage is implemented at vocational secondary schools and general education schools that provide training for acquiring vocational qualification. Students can be enrolled in vocational secondary schools after having completed basic education (grade 8) and/or in general education schools for a vocational programme after having completed grade 7. Vocational gymnasiums and vocational schools deliver vocational training aimed at obtaining a vocational qualification the level of which depends on the duration of the respective training programmes. Vocational secondary education finishes with a matriculation exam and theoretical and practical state exams in the studied profession and specialty. Successful students in all exams receive a diploma of secondary education and a certificate of vocational qualification (EQF levels 2 to 4 depending on the type of programme). The acquired vocational qualification gives access to the labour market. Students willing to continue their education can apply for higher education schools and universities (CEDEFOP, Bulgaria, 2013).

5. Higher Education and Adult Education and Training (ISCED 6-7-8)

The system of higher education is provided exclusively by colleges and universities. In accordance with the Higher Education Act, they are all self-governing and autonomous institutions. The objective of higher education is to train specialists of high qualifications above the secondary school level and to develop science and culture. Currently, the higher education system includes 51 higher schools which are state owned and private, including universities, specialized higher schools and self-contained colleges. The management of the system is implemented at state administration level and at institutional level. The state is responsible for elaboration and implementation of long-term national policy and establishment of an environment guaranteeing academic autonomy of the higher schools, quality of training, and scientific research. The higher schools management is implemented in accordance with their right of academic self-governance. As a result of the active

participation in the Bologna process the following key characteristics have been introduced: three-degree higher education system: Bachelor – comprises two levels – "bachelor" (ISCED 6A) and "professional bachelor in" (ISCED 6B); Master (ISCED 7); Doctor (ISCED 8); a credit accumulation and transfer system; and a European diploma supplement.

Adult education and training is a state priority and takes many forms, ranging from formal class-based learning to self-directed and e-learning. Local authorities are responsible for framing adult education policies for their respective regions. Adult education is most often provided by licensed vocational training centers, as well as Trade Unions, employers, craft chambers, cultural centers and NGOs. Adult education is integrated in the general, vocational and higher education systems and is defined much broader as political and cultural education for active citizenship (BEU, 2014).

Ongoing Reforms and Policy Developments

The education system has been undergoing incessant intensive reforms and policy developments over the last several decades in order to meet the challenges of the 21st century requirements. They predominantly occupy the period between 2012 and 2015 as a starting point and are expected to finish until 2020.

The project of the new *Law of Pre-School and School Education* was introduced in the National Assembly at the end of 2014 stipulating a new understanding and vision of the educational standards and initiating a new educational structure. The basic education is divided into two stages: primary (grades 1-4) and pre-secondary (grades 5-7), and secondary education with two stages: the first high school (grades 8-10) and a second high school (grades 11-12). In fact, this project represents both an old version of the project of the *National Programme for the Development of School Education and Pre-School Preparation (2006-2015)* adopted by the National Assembly in June 2006, and a second attempt to reform the national system of education towards its qualitative structure. In a thorough research tracing back the outcomes of this national programme, Mihova (2007) asserts that "the National Programme [...] might be defined as the most radical education reform during the last sixteen years" and still vainly hopes "that by realization of these intentions our education system will have a legislation which will remove some of now existing shortcomings and contradictions".

Earlier that year, in May 2014, the government adopted a new *Strategy for the Development of Pedagogical Staff*, covering the period between 2014 and 2020. Some of the measures include, for example, developing a united system for education and continuing qualification; legal assurance of the rights and obligations of professional development, etc. The Strategy has also outlined four operational goals connected with developing a united and coherent system for the continuing qualifications of pedagogical staff; creating favorable conditions for attracting, retaining and developing new teachers, as well as experts with a high level of professional training (BEU, 2014).

A new Operational Programme (OP) called *Science and Education for Intelligent Growth* has been launched. Its goal is to establish a very clear bond between the politics realized in the spheres of scientific research, education and pre-school education to the full spectrum of tools and measures fulfilled by MES. The

idea is the scientific infrastructure to receive most funding by the OP and give a bigger boost to Bulgarian scientific teams and organizations to participate in the realization of the separate schemes of the programme "Horizons 2020".

The *National Strategy for Development of Higher Education (2014-2020)* has been designed to lay the foundations for the transformation of the current national system of higher education through consolidation and restructuring of existing higher education institutions, to address the real needs of the national and world labour market and economy. Some of the Strategy's main goals are as follows: stimulating interest in higher education and granting broader access to it; encouraging academic mobility; building an integrated and effective network for scientific research activities and encouraging innovation in higher schools and research centers.

In October 2014 the government adopted a *Strategy for the Development of Vocational Education and Training in Bulgaria (2015-2020).* The main goals of the Strategy are to prepare highly qualified staff to be employed by businesses, to prevent early school leaving among children from economically disadvantaged families, as well as to allow adults to receive professional qualifications in vocational schools and training centers. The Strategy envisions providing quality training through education and work experience, thanks to a partnership between a vocational school and training centers and one or several employers.

The main focus of the *National Strategy on Diminishing the Number of Early School Leavers (2013-2020)* is on ensuring equal access to and support for personal development in the system of formal pre-school and school education, as an early prevention measure. The main objective of the strategy is to promote cross sectoral partnerships in implementing integrated policy to guarantee an open access to education. Among the main measures is the development of a set of diverse incentives to prevent early school leaving which has a negative effect mainly on pupils from Roma minorities. Their total percentage is 12.4% in the year 2013 and the state is aiming at reducing this number under 10% (Eurostat, 2013).

The sector of education has undergone serious and widespread reforms aiming at attaining coherence with educational systems of other European countries. The main goal is to ensure the adaptability of the education system towards new perspectives, to guarantee sustainable system development in compliance with European standards, and to provide valuable and competitive knowledge and skills (BEU, 2014).

Problems and Challenges

Despite the reforms in the field of education during the past few years, the consequences of the state reformative national policy up to date are related to the increase of the effectiveness of the education system, but yet not to its quality. Some of the major problems and challenges over the recent years have repeatedly remained the following: In the school system of education: aging pedagogical staff and the lack of interactive and innovative teaching methods; unequal access to quality education; great numbers of early school leavers; lack of effective national system for quality assurance. In the system of higher education: increasing number of university students and decreasing number of well-qualified academic staff; longer duration of Bachelor programmes compared to other European countries;

lack of coordination between higher institutions and the labor market in relation to the acquired skills and the skills necessary for job realization; insufficiently functioning funding system and low level of scientific research activities.

The total number of teachers working in the general school system is 45,093 for the school year 2013/2014 and the average age is 57 years (NSI, 2014). These data alarm for the negative tendency of aging of school teachers. Raising the quality of school education to a great extent depends on finding a successful formula of attracting young and motivated pedagogical specialists to the teaching profession who can bring more creativity in the classroom.

The official results of PISA 2012 have reported a serious gap between the pupils' performance in Bulgaria and those of the other European countries, although there has been a slight progress since the first PISA participation of Bulgaria in 2000 in terms of the three areas which measure pupils' knowledge – reading, mathematical and natural sciences literacy. The percentage of pupils below the minimum level of knowledge is 39.4% for reading knowledge, 43.8% for mathematical knowledge and 36.9% for natural sciences knowledge (PISA, Bulgaria, 2012). The level of school performance of Bulgarian pupils is directly linked to their social and economic status. Both pupils of Turkish and Roma origin and pupils from lower income families show corresponding lower levels of achievement when their knowledge is measured.

Every seventh child in Bulgaria does not complete their secondary education (Teach for Bulgaria, 2013). The high share of early school leavers will have serious social and economic consequences in the long term for Bulgaria. The largest number of children at risk is among the Roma population. "Roma children and teenagers are less likely to enroll in both primary and secondary schools than the majority population, and less likely to complete their education, if they do" (Genova & Cameron, 2010, p. 15).

Similarly to school education, the major objective is raising the quality of higher education. The total number of university students enrolled in Bachelor, professional Bachelor and Master programs for the year 2013/2014 is 277,239. The predominant total number of students receiving their higher education at state run universities is 231,019 compared to only 46,220 students at private higher schools (NSI, 2014). Over the last decade, higher education is characterized by relatively growing number of university students in contrast to pupils completing their secondary education, but decreasing number of university lectorates and researchers.

At the same time, the duration of higher education period of 4 years is longer compared to other European countries, for example Germany, where Bachelor programmes generally last for 3 years. A decisive step towards changing this practice is shortening the period of Bachelor programmes and combining them with more intensive practical training and experience. This could lead to acquiring the appropriate skills and competences, which are necessary for the labor market and young people's work realization.

The system of financing universities is characterized by a very low share compared to European standards of funding for science and research, and the inappropriate allocation of these funds. Financing programs for research and development in the country has the second lowest level among the EU member states with less than 0.5% share of GDP (NSI, 2011). The total amount of state

financial support for universities should be maintained, however redirected to undergraduates and universities with better performance thus stimulating the rise of quality higher education.

Conclusion

To sum up what has been said so far about Bulgarian education system, in particular its multifaceted structure, ongoing reforms and policy developments, ending up with the problems and challenges that it faces, it can be noted that the desired level of quality of education is still leaving behind in contrast to its effectiveness, despite the good will of the state authorities to improve the situation. They are supported by the accountability of all the parties involved in the educational process – public officials, school managers, non-governmental sector representatives, teachers, parents, pupils and students, to raise the quality of education for every child anywhere, irrespective of religious, racial, regional, gender, social and economic characteristics. These mere aspirations can above all be socially justified for the sake of the whole society.

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THE QUALITY OF EARLY CHILDHOOD EDUCATION CURRICULUM FRAMEWORK IN THE REPUBLIC OF SERBIA

Abstract

The paper addresses Serbian preschool education Curriculum Framework as one of dimensions of the preschool education quality. The first part of paper deals with the importance of preschool education worldwide as a social responsibility and its accountability in education policy. The second part provides the evaluation of the preschool education curriculum framework based on the analyses of the internal inter-connection of the documents content. The analysis used the criteria identified as the indicators of the quality of preschool education worldwide. The results show the discord between preschool education curriculum framework in Serbia and the characteristics of high quality contemporary preschool education programs. Therefore, an initial step in the recommendations for the reconsideration of the quality of the preschool education curriculum framework would be reaching consensus on the values and theories underpinning preschool education.

Key words: quality of the preschool education curriculum framework, cross-national curriculum analysis, purpose of preschool education

Introduction

The education policies recognize the preschool education curriculum framework as an important dimension of preschool education quality (Bennett, 2008; OECD, 2006). In Bennett's study on the indicators of the preschool education quality, curriculum framework is among the fifteen presented indicators (Bennett, 2008).

The relevant literature (Bennett, 2008; Bertrand, 2007; Bertrand &Pascal, 2002; OECD, 2004; Oberhuemer, 2005; Taguma et al, 2012) gives the following reasons for paying particular attention to the preschool education curriculum frameworks in today's world:

- Contribution to recognizing early childhood as the foundation of lifelong learning and an important resource for the development of a learning society;
- They are viewed as the necessary measure on the national level and as the indicator of the public responsibility for the entire education system;
- They become the framework for the quality and equality in fulfilling each child's right to education and within the education;
- They are a precondition to ensure the continuity in preschool and school education;
- They are the framework for the development and realization of the programs in practice;
- They contribute to sharing common goals and understanding of preschool education among the different stakeholders;
- They point out the importance of organizing preschool education in line with neuroscience research.

The Serbian National Preschool Education Curriculum Framework was adopted in 2006 (Ministry of Education and Sports of the Republic of Serbia, 2006). The document on the Preschool Education Curriculum Framework consists of three parts: The Curriculum Framework of care and education of children aged between 6 months and 3 years; The Curriculum Framework of education of children between 3 years and the beginning of school preparation; the school preparation program. This paper analyses the Curriculum Framework for children aged between 3 years until the age of the enrolment into the school preparation program. It has two program documents: Model A and Model B.

Methodology

We have used the method of content analysis. The content of Model A and Model B were used to analyse internal inter-connection within these documents. The analysis was done according to the categories determined in the analysis of the seventeen (17) preschool education curricula frameworks in the study "Analysis of Curriculum/Learning Frameworks for the Early Years (Birth to Age 8)" which gives the key dimensions of preschool education curricula quality (Wilks et al, 2008). Given the length of this paper, we present only some segments of analysis grouped in the four categories with two analysis criteria in each of them:

1. Understanding that the picture of a child influences the relations with that child and the kind of experience we provide for children (child as the right bearer; child as powerful and competent);
2. Understanding the nature of child development and learning (oriented to wellbeing, belonging and building relations; the environment stimulating inquiry based learning);
3. Understanding the importance of collaboration and partnership (empowering children, family and community; preschool teacher as a co-constructor in learning);
4. Understanding the relation of learning and teaching (intertwining learning, teaching and assessment; quality of preschool teacher work). The units of analysis were the larger text units expressing one characteristic, statement or value attitude.

Data Analysis and Discussion

1. Picture of a child

Child as the rights holder. In high quality programs, the child is accepted as the rights holder. The articles 12 and 13 of the UN Convention of the Rights of the Child particularly stipulate – child has right to its own opinion and the right to be involved in making decisions on the issues important in his/her education. The Convention also clearly stipulates the responsibility of adults in supporting children to fulfil their rights and learn about the rights of others. The quality programs operationalize the ways of listening to the children and the ways of aligning daily kindergarten practice with listening to children, their choices, participation and decisions (McLachlan et al, 2010). The data analysis shows that Model A focuses more on the developmental needs than on child rights. In this model, the child has only partial and particular rights determined by the developmental and individual

needs and interests reduced to a free choice of offered activities, materials and tasks s/he can master (Ministry of Education, 2006, p. 36).

The text of Model B states only 'the rights of a child to the adequate care, protection and quality education' without their further elaboration in the program (Ministry of Education, 2006, p. 45). Model B sees the child as a being in the process of reaching the rights to something at an older age.

Child as powerful and competent. The quality programs (e.g. TeWariki; Aistear; Being, belonging, becoming; The Practice of Relationships;...) see the child as powerful and competent according to his/her capacities comprised of his/her strengths and developmental supports. The Serbian Curriculum Framework models do not share such a view of the child's power and competence. Data show that Model A determines child power on the basis of his/her developmental characteristics, needs and limitation, i.e. 'modest logical analytical apparatus; perceptive focus on the context; difficulties with abstracting…' (Ministry of Education, 2006, p. 26).

Model B views a child as powerless and in a deficit regarding the mature personality of a human being having all preconditions for the development of a mature human personality, a being yet to become 'a personality with permanent characteristics' (Ministry of Education, 2006, p. 50).

2. Understanding the nature of child's development and learning

Focus on wellbeing, belonging and building relationships. The reasons why the quality programs address the concept of wellbeing lie on a holistic perception of a child and an understanding of learning as the social process in which it is important that child feels secure, accepted by adults and peers and supported in developing peer identity and belonging to the community. In the programs assessed as the quality ones, a child is viewed from the socio-cultural approach which puts forth the importance of the relationships and the environment as the integral part of the development. Here, the environment is not seen as opposite to or outside development (Krnjaja & Pavlović Breneselović, 2013). Both models of Serbian Curriculum Framework view the child through the separated developmental aspects while the environment is seen as a stimulating environment 'in front of' a child to support and strengthen him/her (Ministry of Education, 2006, p. 26).

A quality of the all stakeholders' relationships (preschool teachers, children, family, local community) is seen as the intertwining of learning as a leading dimension of the program quality (MacNaughton, 2003; Wilks et al, 2008). Model A gives a controversial understanding of relationships. While it defines kindergarten as 'an open system with partnership relationships in education' (Ministry of Education, 2006, p. 35), at the same time it keeps the approach of teachers' observation and assessment of a child. This emphasises the teacher's expert position and puts in doubt power sharing with the child and family. Model B, educating children until their enrolment in a preparatory preschool program speaks about the relationships within the traditional understanding of a preschool institution as a 'factor of social education' while the relations between children, teachers and parents are concretized through the 'permanent tasks' of teachers toward parents and children which also reflects the traditional way of communication (Ministry of Education, 2006, p. 45).

Building learning environment through exploration, engagement, uncertainty, problem solving, practical and life experiences. Quality curricula emphasize and

operationalize the concept of a stimulating environment in which learning happens through participation. Stimulating environment is understood as 'the third teacher'. It does not involve only the environment as indoor and outdoor space and equipment, but also flexible time schedules and a high quality of relationships like partnerships and collaboration (Wilks et al, 2008).

Model A and Model B of the curriculum framework do not consider outdoor space as an equally important place for children's learning. These models also do not speak about the principles of planning and organizing outdoor space.

In the Model A, the environment is viewed within the conception of kindergarten as 'an open system in which the kindergarten is a meeting place of children and adults and a place of connecting mutual life experience' (Ministry of Education, 2006, p. 23). Model B speaks more about the teachers' orientation to the child and activities than about the environment (Ministry of Education, 2006, p. 43).

3. Understanding the importance of collaboration and partnership

Empowering children, family and community. Quality curricula frameworks pay particular attention to the issues of partnerships with family and local community and empowering teachers to develop community of practice (Moss, 2007).

Model A of Curriculum Framework views the partnership with family and community as one of the dimensions of the curriculum openness but with several controversies. The document states that a family is also the 'service user' and emphasizes 'supplementing family education' as tone of the functions of preschool education (Ministry of Education, 2006, p. 23), which both do not assume collaboration and partnership with family. The cooperation with local community is reduced to the forms of cooperation 'based on the mapping children and parents' needs' (Ministry of Education, 2006, p. 24), instead of concretizing the environment as the learning context in accordance with understanding the open system. Model B does not provide a clear concept of collaboration with family, spreading from the preschool institution expert role to the relationships characteristic for an open system which is incoherent with the academic orientation of this model.

The quality curricula value the cultural diversities and inter-culturality as the wealth of learning situations (Ministry of Education New Zealand, 1996). Quality curricula are 'open' for children from marginalized groups, children with developmental difficulties, disabilities, children from diverse cultural communities. The standard of the program is diversity itself. Model A views the diversity within the preschool institution functions, as placing the accent on the preventive and compensatory function of the preschool curricula in 'protecting children with developmental difficulties and those from the vulnerable groups' (Ministry of Education, 2006, p. 14). The program gives the recommendations for the necessity of integrating 'special needs children' (Ministry of Education, 2006, p. 14). Model B mainly takes age capabilities as differences, while accepting diversities in developing the program is reduced to the content of certain activities with children. The attitude toward the cultural diversities in the Curriculum Framework models reflects respect for the cultural diversities only at the level of certain contents and activities. There is no mention of inter-culturality, appreciation of different languages and cultural practices.

View of the preschool teacher as the participant and co-constructor in learning. Quality preschool education curricula view the teacher in a role of participant in the

co-construction of meaning and the initiator and participant of quality interactions and relationships.

Model A sees the preschool teacher as an assistant who creates conditions, monitors and participates in learning only if children ask him/her for it. The teacher's focus on preparing the conditions, monitoring children's discoveries and learning corresponds to the developmentally appropriate practice in which a teacher is an expert who observes, evaluates children's learning and provides help if children ask for it. Model B sees the preschool teacher as the professional who encourages and directs children by pre-planned program contents. This reflects the relationships characteristic for the traditional, academic approach to learning and teaching.

4. Understanding the relation between learning and teaching

Intertwining of learning, teaching and evaluation. The quality curricula focus on a holistic approach to learning. Learning situations are not seen as the isolated situations of 'concentrated' learning related to life situations in which children learn (Arthur et al, 2012). Furthermore, the development of quality curricula is based on the participatory evaluation of the adults and children which not only strengthens their reflexive capacities on own learning but is primarily seen as the area of common understanding of learning process and the curricula re-consideration.

Model A presents learning, teaching and evaluation in a spiral cycle so that they follow from each other as the mutually agreed activities of children and teachers and as an integral part of the planned and spontaneous situations in the kindergarten. However, the curriculum inconsistency ensues from reducing documenting to the evaluation of children's learning and development rather than the process of developing the program as a whole. Model B gives priority to a preschool teacher's plan on guiding the development of a child's cognitive structures which the teacher consistently realizes through the system of activities. A controversial relationship between teaching and evaluation is reflected in the teacher's task to assess the educational work on the basis of each child's progress (Ministry of Education, 2006, p. 55). Thus, the responsibility for children's progress is not placed in the way of making and implementing the teacher's plan but in the child him/herself.

The quality curricula integrate the development of multi-literacy (linguistic, mathematic, digital) through active research, exploring and problem solving during play, planned learning situations and routines. Besides integrated learning, quality curricula approach multi-literacy as an integral part of the community to which a child belongs.

Model A has a controversial attitude toward mathematic and linguistic literacy. It simultaneously treats them as separate activities or education areas and as elements of integrated learning in the projects. Model B presents mathematical and linguistic literacy as separated activities. Neither of models mentions the multi-literacy concept or speaks about the relevance of digital literacy for the child's experience in the contemporary world.

Understanding the quality of preschool teachers' work as a key dimension in program development. The quality of curriculum depends on the way the teachers understand and realize it. Therefore, the quality curricula speak to the preschool teachers and see them as the leading figures in developing the authentic programs with children and parents.

Model A sees the preschool teacher as the program creator, researcher and reflexive practitioner and pays particular attention to the meaning of reflexive practice (Ministry of Education, 2006, p. 40). A preschool teacher is expected to critically examine the curriculum and adjust the conceptual recommendation to the concrete conditions in which the curriculum is implemented. Model B requires preschool teachers to realize goals, tasks and requirements given in the curriculum by choosing the order or sequence in which they will be realized. Model B of the preparatory preschool program views the preschool teacher as an implementer of the methodical steps in developing a child's readiness for regular schooling.

Conclusions

The analysis of Preschool Curriculum Framework, Models A and B, show that although these models are the part of the same curriculum framework they are written as separate entities which are:

- *In discord in relating the approach to preschool education*. Model A is based on the child-cantered developmental psychological orientation while Model B focuses on the academic orientation of the curriculum directed to knowledge acquisition and the development of cognitive capabilities. The two different conceptions of preschool education in the Curriculum Framework reflect the lack of coordination in the national approach to preschool education which results in no clear foundation for the initial education of preschool teachers and their professional development and for the conceptualization of preschool education institutions' quality and organization.
- *Insufficiently coordinated with the criteria of the worldwide quality preschool education curricula*. The characteristics of the quality worldwide curricula ensuing from the socio-constructivist orientation and the contemporary understanding of childhood sociology, post-modernism and post-structuralism are not taken into account in the Serbian preschool education curriculum frameworks.

The reconsideration of the Serbian preschool education Curriculum Framework quality primarily calls for achieving the social consensus on the value based and theoretical approach towards preschool education. Adopting a curriculum framework based on the quality programs' criteria should be based on the joint engagement of researchers, practitioners, and policy decision makers in re-consideration of the current preschool education in Serbia and on further research of preschool education policies and practices worldwide.

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EVALUATION OF SCHOOL EDUCATION IN SERBIA

Abstract

In the education system of Serbia significant results have been achieved in the last ten years regarding the establishment and development of the evaluation system in education and the practical application of various types and procedures of evaluation. This paper gives a short overview of ways in which evaluation is carried out on elementary, secondary and higher education levels in Serbia. The overview is accompanied by a reference to problems and difficulties which are encountered in the practical application of educational evaluation. The final part of the text points to assumptions which need to be provided so as to use evaluation as a starting point for improvement and development of school education quality.

Key words: school evaluation, evaluation of students' outcomes, teacher evaluation, evaluation of higher education, quality of school education

Introduction

The issue of function, procedures and content of educational evaluation has been made current in recent years in many countries. The reasons that led to the need to introduce certain changes in the existing evaluation system are related to: the existence of growing demands for achieving effectiveness, efficiency and equity of education in order to respond to economic and social challenges; the need to monitor and supervise the quality of the schools, which occurs as a consequence of giving them a greater autonomy; the need to base decision making, to a greater extent, on evaluation results, thus making it evidence-based (Spasenović, 2013).

In Serbia in the last ten years there have also been significant changes in the domain of evaluation policies and practices. This paper provides a brief overview and analysis of evaluation structures and procedures which are applied in the Serbian school system. The overview is given by noting the types of evaluation applied on different levels of education, as well as by the components of school education which are under evaluation. Thereby, the emphasis is placed on the overview and analysis of segments of the complex system of school education evaluation, within which the most significant changes have occurred during the course of the last decade.

School evaluation

School evaluation in Serbia is carried out in the form of external school evaluation and school self-evaluation.

External evaluation of schools

External school evaluation is carried out in the form of inspection and pedagogical supervision of school work. Inspection supervision, which is the remit of municipal, i.e., city administration and which is performed by educational inspectors, looks into enforcement of laws and regulations by a direct insight into

school work and, depending on the results of the insight, imposes measures and controls their implementation. Pedagogical supervision, which is the remit of the Ministry of Education, assesses, by a direct insight into teaching and other school activities, the quality of school work against the determined standards, the implementation of the school curriculum and the school development plan, provides help and support to employees at school in performing educational work and self-evaluation and proposes measures for quality improvement (*Zakon o osnovama sistema obrazovanja i vaspitanja*, 2009).

Novelties in terms of external evaluation of schools date from 2012 since when this process has been conducted under a new procedure (*Pravilnik o vrednovanju kvaliteta rada ustanova*, 2012) and in line with the newly-established standards of work quality of institutions (*Pravilnik o standardima kvaliteta rada obrazovno-vaspitnih ustanova*, 2011). External evaluation includes the analysis of pedagogical documentation (programme documentation and work reports); direct monitoring of educational activities; interviews with school employees, parents and students. The state of affairs is assessed in seven work quality domains (school curriculum; teaching and learning; students' achievements; support to students; ethos; resources; management, organisation and quality assurance), and the general score of school work quality is given on a scale from 1 to 4.

School self-evaluation

The initial steps in the development of school self-evaluation were taken in the period from 2003 to 2005 when the *Evaluation and Self-evaluation of School Work* project was launched within which key self-evaluation domains were determined and the usability of indicators and developed instruments was tested (*Priručnik za samovrednovanje i vrednovanje rada škola*, 2005). A special training programme for employees in educational institutions was delivered with the aim of training them for self-evaluation and providing additional support in implementing that process. The aforementioned project activities provided the basis for development of bylaws and elaboration and definition of work quality standards of schools, against which school self-evaluation is performed (as well as external evaluation of school work). School self-evaluation, jointly performed by professional school bodies, School Board, principal, Parents' Council and Students' Parliament, is used to assess: the quality of education programmes; all forms and methods of teaching delivery; professional development of teachers and of other school staff; conditions in which school work is carried out; student and parent satisfaction with school work ... (*Pravilnik o vrednovanju kvaliteta rada ustanova*, 2012).

Given that external school evaluation and self-evaluation of school work are a relatively new practice in our milieu, for the time being there have not been too many research papers dealing with implementation and effects of these processes. However, based on the insight into practitioners' experiences, it could be concluded that external evaluation of schools still provokes resistance with practitioners, due to the fear of identifying problems in education provision and disclosing results of school work. As for self-evaluation, it seems that the implemented procedures and methods are still not sufficiently developed, as well as mechanisms of necessary professional help and support to practitioners in this process.

Evaluation of students' outcomes

Monitoring students' work and development, as one of key domains of the evaluation in education, has undergone significant reviews and changes in the last ten years. Visible efforts have been made, for example, to ground school assessment on learning outcomes and defined standards of students' achievements, that is, to provide assumptions for practical implementation of criterion-based assessment, as well as to apply a combination of formative and summative assessment. In addition, conducting evaluation research into students' achievements and the introduction of final exams at the end of elementary and secondary education are of particular importance in the domain of monitoring students' work and development (Hebib, Matović & Baucal, 2011).

Testing students' achievements

National testing of students' educational achievements, whose main objective is to monitor schools and the education system, has not been carried out continuously and systematically in Serbia. So far, such research studies were carried out twice – in 2003 for third-grade students and in 2006 for fourth-grade students in both Serbian language and Maths (as key parts of curriculum in junior grades of elementary school).

Since 2003 Serbia has taken part in international research projects PISA (Programme for International Student Assessment) and TIMSS (Trends in International Mathematics and Science Study). In all four research cycles of PISA project Serbia was significantly below the average (Pavlović Babić and Baucal, 2013). In the first two research cycles of TIMSS research, when eight-graders participated, Serbia achieved scores below or near the average, and in the last research cycle in 2011 when four-graders participated, the score in both domains tested was above the average (Gašić Pavišić & Stanković, 2012; Janjetović, Malinić &Tošković, 2005).

Unfortunately, there is still a disagreement among the policy makers and administrators in the interpretation of the purpose of participation in international projects related to the research into school effectiveness, as well as a lack of seriousness regarding provision of financial and other necessary resources for implementation of evaluation projects and activities (so due to the delays in fulfilment of obligations towards OECD, Serbia will miss participation in the PISA 2015 cycle, whereas participation in the next TIMSS research cycle is still uncertain at this moment).

Final exams

Final exams in Serbia are taken after elementary, i.e., compulsory education and after secondary education. The final exam after compulsory education, which has been implemented since 2010/11, replaced the former qualification (entrance) exam (whose function was to select students for continuation of education in four-year secondary schools) and it was introduced with the purpose to: assess the accomplishment level of standards for the end of compulsory education; obtain the certificate of completed compulsory education; select students for (upper) secondary education. The concept of the final exam was gradually changed from 2010/11 academic year, with the idea that its final model be applied in 2013/14 (namely, the number of already known tasks, which had previously been published in the

collections of tasks, was gradually reduced in the mother tongue tests, and Maths and from 2014 the combined test was introduced including the following subjects: History, Geography, Biology, Chemistry and Physics).

The valid legislation envisages that the final exam, that is the matura exam – general, vocational and art, is taken after three-year and four-year secondary education. General matura, as defined, allows transition to the university education level and is taken upon completion of four-year general education in grammar schools; however, students who completed four-year vocational or art education also have the right to take general matura. Vocational or art matura is taken by students after completion of the third, i.e., fourth grade of secondary vocational or art school and they have the right to enrol to appropriate higher education institutions in line with the defined terms of entrance (*Zakon o osnovama sistema obrazovanja i vaspitanja*, 2009; *Zakon o srednjem obrazovanju i vaspitanju*, 2013). The implementation of the new matura concept, which should, at the same time, replace entrance exams at universities, is only planned for 2018/19 academic year.

On the basis of the data on implementation modes and results of the so far conducted final exams, it can be concluded that serious problems occur regarding consistent application of rules and procedures in all stages of preparation, implementation and assessment of the exam. It is therefore necessary to work further on ensuring assumptions for the final exams to provide objective and reliable data on students' achievements, as well as that all participants in the final exam take their share of responsibility for its regularity (*Izveštaj o realizaciji i rezultatima završnog ispita...*, 2014). It is also noticeable that the possibility to use the achieved final exam results as a starting point for external evaluation of school work and evaluation of the school system as a whole (which is, undoubtedly, its important purpose) is still not sufficiently recognised. This function of final exams is still not fully performed although reports on results of the final exam are prepared and distributed, which are meant to serve educational policy makers, academic and professional public, as well as employees at schools, as an important starting point in getting an insight into the existing situation and creation and implementation of activities aimed at education quality improvement.

Evaluation of teachers and of other educational personnel

Evaluation of teachers, school counsellors and principals of elementary and secondary schools in Serbia has been conducted as part of external school evaluation, that is, supervision over school work, and as part of school self-evaluation. Pedagogical supervision over school work is namely carried out as general, special and individual; the last form mentioned refers to evaluating teachers and other educational professionals on an individual basis (*Pravilnik o stručno-pedagoškom nadzoru,* 2012). Methods and procedures, as well as quality assessment criteria are elaborated in line with the defined standards of professional competences (competence standards for teachers and school principals have been defined and adopted). When implemented as part of school self-evaluation, evaluation of teachers, school counsellors and school principals is carried out through research and evaluation activities independently initiated by employees at school with the aim of analysing processes and results of all segments of school work and finding opportunities for improvement of practice.

According to the estimates made by teachers themselves, as shown by the latest research in this area, the evaluation of educational staff is burdened by numerous problems and difficulties. The teachers point out that evaluation of teachers does not fulfill its primary purpose, that is, it is not used as a basis for developing teachers' work and performance, as well as that external evaluation of their work is related to a controlling function and that it is not accompanied by a developed system of providing professional help and support for teaching improvement. On the other hand, various self-evaluation procedures of teachers' work are not carried out as planned and systematic procedures, since teachers do not see the significance of that process clearly and they are not sufficiently trained for its implementation (Stančić, 2015).

Evaluation of higher education

In recent years remarkable results have been achieved in establishing and developing the quality assurance system in the field of higher education. Quality in the field of higher education is assured through processes of institutional and curriculum accreditation and external evaluation and self-evaluation of higher education institutions (*Akreditacija u visokom obrazovanju*, 2010; *Zakon o visokom obrazovanju*, 2005). The accreditation procedure is carried out every five years, whereas self-evaluation takes place every three years. Higher education quality standards have been defined (such as: standards for quality assurance of higher education; standards for accreditation of higher education institutions and study programmes; standards for self-evaluation and quality evaluation of higher education institutions) against which external evaluation of higher education institution quality is conducted (through the accreditation system and integration and analysis of universities' and faculties' self-evaluation reports), as well as self-evaluation. The evaluation and self-evaluation procedure is further developed in more details through various documents on university and faculty levels and there are established professional bodies and commissions in charge of implementation of those processes.

Nevertheless, considered as a whole, it can be noticed that the existing practice of higher education evaluation is characterised by a focus on evaluation of scientific and research work, while evaluation of teaching quality is now far less developed (Hebib, 2014).

Conclusion

It could be said that a great deal has been done in Serbia in the last ten years on providing conditions for successful implementation of different types and procedures of educational evaluation. The practice of implementing evaluation in education is regulated by a series of legal provisions and by-laws, school education quality standards have been elaborated and defined, as well as mechanisms and procedures to assess the level of their achievement. However, the data obtained by application of certain evaluation procedures indicate numerous difficulties and problems in the education system and in school practice. It is therefore especially important to pay attention to the issue of how to create conditions to use evaluation data for improvement of school education quality.

In the immediate future   it is necessary to develop capacities (individual, institutional and system capacities as a whole) for 'absorption' and usage of results of evaluation in designing comprehensive and carefully targeted interventions, that is, reform actions and processes directed towards education quality development.

Also, more intensive and more serious work is necessary on raising the awareness of all participants in school work and the school system regarding the importance of taking responsibility for school education quality assurance and development and the necessity for continuous and systematic evaluation in education (Hebib & Spasenović, 2014).

Acknowledgments

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EARLY CHILDHOOD EDUCATION AND CARE (ECEC) QUALITY STANDARDS IN THE REPUBLIC OF IRELAND AND THE REPUBLIC OF SERBIA: TWO DISCOURSES OF QUALITY

Abstract

The paper provides a comparative analysis of establishing quality in early childhood education and care (ECEC) in the Republic of Ireland and the Republic of Serbia. The analysis is done through desk research of documents dealing with the standards of quality. The following dimensions were compared: 1) The way of preparing and adopting documents; 2) The function of standards; 3) Structure and content of the documents; 4) Evaluation of quality. The comparison of understanding and the purpose of ECEC standards in the two countries has shown the difference between the discourse of building quality and discourse of quality assurance by standardization as the external measure of quality. Whilst in Ireland, the evaluation of the quality is seen as the process of re-consideration and building quality, in Serbia, this is a one off 'act' of measuring and control.

Key words: discourses of quality, early childhood education and care, standards of quality

Introduction

The issue of quality of education has been in focus for preschool education policies and practices for at least two previous decades (European Commission…, 1996; Bennett, 2008; Working Group on ECEC..., 2014; OECD, 2006). Establishing quality by standardization has undoubtedly been the dominant approach, not only in early childhood education. Since quality is not a monosemic, uniform concept, the meaning of standards is also defined differently due to the different understandings of their nature, purpose and function. Such differences ensue from the differences in the approach to quality. The analysis of theoretical approaches, education policies and practices has shown the two dominant discourses of quality: quality assurance and quality building discourses (Krnjaja & Pavlović Breneselović, 2013).

Quality assurance discourse is based on the understanding of education practice as a rigid or deterministic system which can be regulated by input control. It is also underpinned by positivist theory which sees quality as something tangible and measurable that can be perceived, examined and measured. Quality is something objective, independent of our values. The knowledge on quality is obtained by quantitative measurements, assessment scales, correlation studies, experiments and quasi-experiments. The empirical research provides data and articulate theories and postulates on quality which are infused in practice by standardization (Fenech et al., 2008).

Quality building discourse is based on postmodern systemic approach and socio-cultural theoretical orientation. It recognizes education system practice as a complex and purposeful system based on values – as "purpose seeking" system (Banathy, 1991). A quality is socially and culturally determined concept and thereby

it is contextual and dynamic, subjective, pluralistic, multi-perspective and values underpinned. Quality requires continuous monitoring and reconsideration which never reaches a final "objective" definition (European Commission..., 1996). According to Dahlberg and associates (Dahlberg et al., 2007) quality is based on the evaluation in a participatory interpretative process involving dialogue and argumentation. This evaluation is a theme of the participants' reflexion in a given context related to the key issues of preschool education: what constitutes our picture of children, what do we aim for in children's education (Urban, 2015).

Analysis and Discussion

The goal of our research has been to find out the differences in the meaning of the quality standards by the comparative analysis of establishing quality in the Republic of Ireland and Serbia. We have compared those two practices by analysing the official webpages and documents of education policy dealing with ECEC quality. The main analysed documents were *The National Quality Framework for Early Childhood Education* – SIOLTA[1] in Republic of Ireland (CECDE, 2006) and *Quality Standards of Preschool Settings in Serbia* (MPNTR, 2012). The following dimensions were compared: 1) Document development; 2) Function of standards; 3) Structure and content of the documents; 4) Evaluation of quality.

Document development. The document *National Quality Framework for Early Childhood Education* – SIOLTA was developed by The Centre for Education and Development in Early Childhood (CEDEC) on behalf of the Irish Department of Education and Skills (Duignan et al., 2007). The document development was preceded by the several researches on theory and practice of ECEC in the Republic of Ireland and other countries. The research results were presented in the four publications: results of research on the different perspectives on quality (children, parents and practitioners) (Duignan & Walsh, 2005); overview of the national policy, practice and research on quality (Duignan & Walsh, 2004); overview of the cross national policies and practices of establishing quality (Schonfeld et al., 2004) and the study on preschool education in Ireland (Fallon, 2005). In addition, the development of the quality framework design has been preceded by a three-year consultation with more than 50 diverse organisations, representing childcare workers, teachers, parents, policy makers, researchers and other interested parties. *National Quality Framework* has been supplemented with the user manuals for the practitioners in all kind of ECEC programmes.

The document *Quality Standards of Preschool Settings in Serbia* (MPNTR, 2012) has been developed in two-year work by the expert group, consisting of the representatives of preschool institutions and professional associations, experts from the Ministry of Education, Institute for the Improvement of Education and from the project IMPRESS (Improvement of ECEC System in Serbia) funded by the EU Commission. No systemic research preceded the development of the document. In the project IMPRESS the guide for the self-evaluation of ECEC settings was produced (Benett et al., 2012). The Proposal of the standards was made available for

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[1] The word Síolta means 'seeds' in Irish. The word seed is used as a metaphor for the ways in which the framework can be used as a developmental tool, facilitating the growth of each service to their full potential and in their own distinctive way.

a three-month public discussion on the webpage of the Institute for the Improvement of the Education with the possibility to post comments and suggestions. Following the public discussion, no data on its results or the amendments to the Proposal of the standards have been made available. The Standards was adopted by the National Education Council.

There is no special webpage on the standards of quality in Serbia. The document itself is available on the National Education Council webpage while the information on the process of document development is available on the Institute for the Improvement of Education webpage. None of the webpages give any additional information, resources or publications supplementing the standards.

Differences in the function of standards. Siolta functions are: 1) to recognize valuable aspects of practice and to identify those aspects that need to be improved; 2) to encourage practitioners to re-consider and reflect on the different aspects of their practice individually or in teams. *Siolta* is process oriented. The essence of both functions is to promote the reflexive practice in which Siolta is seen as the mean for the continuous development of the quality practice.

The function of the *Standards* in Serbia is to 'enable equal and objective assessments of the ECEC settings practice and contribute to the quality, consistent and efficient application of legislative demands' (Pravilnik…, 2012, p. 2).

Differences in structure and content. Síolta is comprised of three interrelated elements: Principles, Standards and Components of Quality. The 12 Principles provide the overall vision of the Framework. Sixteen inter-connected standards 'translate' the vision expressed in principles into the reality of the practice. There is an explanation for each standard including a brief overview of research that can support and extend understanding of standard. They link each standard to the overall theme of quality in early childhood care and education (ECCE) and offer practical suggestions about how that research evidence can be used to promote and develop quality in everyday practice. The standards are additionally concretised by 75 components. The components are further explained by a set of Signposts for Reflection and 'Think-abouts' which are intended to support practitioners in early education settings to become aware of and critical of their practice. The purpose is to encourage practitioners to initiate discussions relevant to their practice. The practitioners may use these guidelines for individual reconsideration or for the analyses in the context of the practice within the group and/or professional networks.

The Standards of quality in Serbia have 7 evaluation areas, 27 standards and 133 indicators. The document defines standards as 'the statements on the quality practice or the conditions for realising the practice'. The indicators are, operationalised definitions used to measure the achievement of standards (Pravilnik..., 2012). The document does not give the starting points or principles for setting the standards, while the values of the preschool education from which the standards originate remain unclear. Siolta standards of quality cover different areas of preschool education ensuing from the principles, while in the Standards of quality in Serbia the criteria of dividing the practice to which standards apply, are not clear so they do not cover the entirety of the kindergarten practice. For example, there is not a single standard on the evaluation at the institution level. The evaluation is indirectly mentioned in Standard 6 'Work organisation and management' which outlines the principal's role in taking actions and measures to improve the educational work and

in the indicator 6.4.6. – 'Self-evaluation team continually conducts the self-evaluation of the institution's work' (MPNTR, 2012, p. 7).

Contrary to this, Siolta Standard 8 refers to planning and evaluation and has the three indicators: 1) The practice is re-considered in the cyclic process of assessment, planning, action and evaluation; 2) Re-consideration is based on the established structure of documenting; 3) There are mechanisms ensuring that the re-consideration process leads to changes in the practice – the outcomes of re-consideration reflected in the change of practice are documented, stored and used for the exchange of experience with others (CECD, 2006). Each indicator is given with two or three guidelines for the reflexion and each guidance for the reflexion suggests 8-9 topics for the practitioners to contemplate and reflect on.

Evaluation of the quality. Siolta, as the program of the development of quality can be implemented informally and formally. In informal implementations, all practitioners have materials necessary for Siolta and use them as guidelines to improve practice in their institutions. The development of quality is based on the practitioners' self-monitoring and self-evaluation. The institutions start the formal implementation of Siolta by voluntary application for getting the sign 'Quality in Education' which assumes the development process of building the quality. The goal of evaluating the quality is to develop the network of preschool education quality through the process oriented to re-consideration and revision of the ways of monitoring the quality; development of ancillary supporting materials; encouragement of research with children and parents; raising the public awareness on the importance of preschool education. The evaluation of quality is based on the evaluations of the development of quality done by the participants in the kindergarten practice and Siolta coordinators. Coordinators work with practitioners on the development of quality by helping them to identify difficulties and improve practice. The evaluation of quality underlines the importance of: 1) Multifaceted perspectives of evaluation; 2) Equal importance of internal and external evaluation; 3) Equal importance of summative and normative evaluation; 4) Validity, reliability and fairness are strengthened by openness and transparency. The evaluation of quality is done in several phases: registration; evaluation of the current state of practice; planning actions. A plan containing the description of actions and their schedule is made by the practitioners with the coordinator's assistance. The period between the registration and the verification of the quality lasts about eighteen months. It is expected that, during this period, the institution participates in and undertakes a number of the development activities to achieve the standards, revise the programs and develop the reflexive practice. When the institution feels that it is ready for verification, they invite the evaluator who, together with practitioners, prepares two kinds of reports: summative and narrative. The narrative report includes guidelines for further development. The institution can get the sign of quality in education (minimum rating 2 out of 4) or, if it assesses that its work on the achievement of standards has not been successful enough it can re-open the process of support for the quality.

In Serbia, the Standards of quality are the basis for the self-evaluation and external evaluation of the early childhood setting. These two processes are entirely separate. Self-evaluation of the quality is *the institution obligation* which has to be done annually for the selected area of standards and once each five years for all

standards. Self-evaluation is led by the institution's self-evaluation team on the basis of the annual self-evaluation plan and the stipulated sources of data. External evaluation of quality of the work of the ECEC setting is carried out by the Ministry of Education and the Institute for the Evaluation of Quality professional pedagogical inspectors. The evaluators spend a week in the setting and prepare an expert report which contains the quantitative assessment of quality and instructions for further work.

Conclusions

The comparison of understanding and the purpose of the ECEC quality standards in the Republic of Ireland and Serbia shows the differences between the systemic approach to quality in the discourse of building quality and the discourse of quality assurance through standards as a tool for evaluation. The comparative analysis of the two models of evaluating quality shows the substantial differences in the approaches. In Ireland, the evaluation of the quality is a process of quality development, whilst in Serbia it is the one-off 'act' of the assessment of quality.

Given different approaches to the areas and functions of standardization, the ways of setting and presenting the principles and standards in the document structure and content, we may conclude that *Siolta* represents a vision of supporting the quality practice and the guide for building quality. Evaluation is not a system of control but a system connecting interests through dialogue and common meaning. It is a system establishing a mutual support and bridge between the national curriculum framework and actual practice (Urban, 2015). The emphasis is on the reflexive practitioners, their professional autonomy while the children and the family are the participants in the process of building quality.

The standards of quality in Serbia are an external set of regulations. The practice is regulated and controlled by setting the standards, monitoring and evaluating them. The practitioners are placed in the position of 'objects' of external expertise whilst the children and families have the status of consumers. Such an approach brings us away from the understanding of quality given in the most recent EU document on the quality of preschool education which states that 'quality is a relative concept based on values and beliefs, and defining quality should be a dynamic, continuous and democratic process. A balance needs to be found between defining certain common objectives, applying them to all services, and supporting diversity between individual services' (Working Group…, 2015, p. 8). This suggests the need for transformation of preschool education. This transformation should start by the explicit stating of the values underpinning preschool education: what do we believe in regard to the child and his/her learning and what role does the society, family and practitioners have in this?

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SOCIAL JUSTICE AND MUSIC EDUCATION: TOWARD A MULTICULTURAL CONCEPT OF MUSIC EDUCATION

Abstract

One of the primary goals of multicultural education is to change the current structure of the educational system and to bridge the widening gaps between students of different background. Similarly, multicultural art curriculum fosters the formation of attitudes and perceptions that help people confront their sociocultural biases. The aim of this article is to clarify the terminological issues related to multicultural (music) education, to present the ways of performing world musics in school and to show how multicultural music education can be used as a tool for expanding students' cultural knowledge and tolerance.

Key words: music education, multicultural music education, world musics

Multicultural education

Multicultural education is infiltrated in almost every area of American and European educational system. It can be portrayed as a multifaceted, change-oriented approach that emphasizes equity and intergroup harmony. Multicultural education is "a belief and a process whose major goal is to transform the educational structure in our schools" (Boschee et al, 1997, p. 217). It is "an idea stating that all students, regardless of the groups to which they belong, such as those related to gender, ethnicity, race, culture, social class, religion, or exceptionality, should experience educational quality in the schools" (Banks & Banks, 1993, p. 25).

Multicultural education emerged in the early 1960s out of the Civil Rights Movement. The main goal of the multicultural education was to improve educational achievement for ethnic students who were being disenfranchised by the educational system and to promote respect for a wide range of cultural groups (Banks & Banks, 1993). It has the potential to help bridge the widening gaps between people of different background and includes three important dimensions: (1) the inclusion of multicultural content, authentically and respectfully presented, (2) addressing cultural perspectives, biases, and stereotypes, and (3) equity in the teaching-learning process for students from diverse backgrounds (Banks & Banks, 1993).

Sleeter and Grant (1987) explain and categorize the range of what they identify and define as multicultural education. They report five approaches to multicultural education:

1. *Teaching the culturally different.* This approach maintains teachers' responsibility as the preparation of "students of colour, special-education students, white female students and low-income students to fit into the existing classroom and later into adult society" (Grant & Sleeter, 1989, p. 50).

2. *The human relations approach.* It defines the major purpose of schooling as helping students of different backgrounds to get along better in a world made continually smaller by modern technology and mass media.
3. *Single group studies.* When using this approach, teachers construct courses based on the contributions and perspectives of one particular cultural group (Sleeter & Grant, 1987).
4. *Multicultural education.* Multicultural education may be understood as a "cultural democracy" approach, for it "promotes cultural pluralism and societal equity by reforming the school program" (Sleeter & Grant, 1987).
5. *The education that is multicultural and social reconstructionst.* This approach prepares students to challenge social, structural inequality and to promote the goal of social and cultural diversity (Sleeter & Grant, 1987).

Gollnick and Chinn (1990) stated that a multicultural curriculum should promote strengthening and valuing cultural diversity, human rights and respect for differences, alternative lifestyle choices, social justice and equality, and a just distribution of power and income.

Despite differences in descriptions and definitions of multicultural education, all the authors agreed that one of the primary goals of multicultural education is to change the current structure of the educational system.

Multicultural music education

Trying to define multicultural music education, Campbell stated that "multicultural music education is the study of music from groups distinguished by race or ethnic origin, age, class, gender, religion, lifestyle and exceptionally" while "a music program that focuses in greater depth on a representative and prominent musical style of a group of people united by national of ethnic origin is a model of 'multiethnic music education'" (1993, p. 15).

Walker suggested that the main focus of multicultural music education should be "the culture-specific qualities of any musical practice" (1990, p. 81). Blacking (1987) was critical of multiculturalism because he believed that it promoted discrimination and segregation so he questioned the goals of incorporating world musics in music education.

Shippers defined *world music* "not as a form of music, or even a wide variety of different musics, but as the phenomenon of music instruments, genres, and styles establishing themselves outside their cultures of origin" (1996, p. 17). Campbell suggested that *world music education* "features the study of musical components as they are treated in various musical styles across the world" (1993, p. 16).

A multicultural art curriculum in general fosters the formation of attitudes and perceptions that help students, teachers, and the community confront their sociocultural biases. Although the question of curriculum development for the multicultural art classroom is very important, it has been largely neglected both within art education literature and in practice. There are six position statements for teaching art in a multicultural classroom (Wasson, Stuhr & Petrovich-Mwaniki, 1990):

1. We advocate a socio-anthropological basis for studying the aesthetic production and experience of cultures, which means focusing on knowledge

of the makers of art, as well as sociocultural context in which art is produced.

2. We acknowledge teaching as cultural and social intervention; and therefore, in any teaching endeavour, it is imperative that teachers not only confront, but also be aware of, their own cultural and social biases.

3. We support a student/community-centred education process in which the teacher must access and utilize the students' sociocultural values and beliefs and those of the cultures of the community when planning art curricula.

4. We support anthropologically-based methods for identifying socio-cultural groups and their accompanying values and practices which influence aesthetic production.

5. We advocate the identification and discriminating use of culturally responsive pedagogy that more democratically represent the sociocultural and ethnic diversity existing in the classroom, the community, and the nation.

6. We want to focus on the dynamic complexity of factors that affect all human interaction: physical and mental ability, class, gender, age, politics, religion, and ethnicity. We seek a more democratic approach whereby the disenfranchised are also given a voice in the art education process; and the disenfranchised, as well as the franchised, are sensitized to the taken-for-granted assumptions implicit in the dominant ideology.

Teachers are the translators of the culture. Culturally competent teacher are individuals who: (1) Have examined and resolved personal biases and are aware of and accept their own cultural backgrounds. (2) Posses an inclusive understanding of multiculturalism and incorporate an anthropological approach to art education. (3) Are sensitive to others' cultural background and tailor their teaching to meet their students' culturally particular needs. (4) Have an understanding of the traditions of diverse world cultures. (5) Have made the commitment to continue their own education in multiculturalism and diversity (Andrus, 2001).

Music education systems around the globe have some common areas (Hargreaves & North, 2001): (1) The importance of historical, political and cultural backgrounds. (2) The structural division of music education into generalist and specialist spheres. (3) Aims and objectives. (4) Distinctions between formal and informal methods of teaching/learning, and the varied settings of music education in institutions, in communities, or in combinations of these.

American and European public school music education has been dominated by the traditional folk and art music of Western Europe, and by emphasizing the importance of Western music, educators have implied a relative unimportance and inferiority of other musical systems (Anderson & Campbell, 1989). A critique of ethnocentric and western-classical paradigms of music education has consistently featured in music education literature from 1970s onwards (Campbell, 1997; Hargreaves & North, 2001). But the inclusion of world musics in music education programs has become increasingly important in recent decades.

Performing music of another culture can give us a direct experience that listening alone cannot. If music is to function as a bridge between cultures, as performers we must be ready to move out of our comfort zones and experience

music in a completely new way. There are eight simple rules for choirs and conductors to follow in performing music of the world's traditions.

The first one is to *connect with culture* and try to make direct contact with a native of the culture who can give firsthand information about the music, language, and cultural context of the piece being performed. The second rule is to *focus of one style* at a time which means that conductor should focus on music of only a few cultures at a time, performing more music from each. The third rule is to *listen widely* which means that in the case of world music conductors need to listen to performances by several groups or styles form the cultural tradition at hand to gain a better understanding of the music performed. The fourth rule, to *provide the context*, means that background information about the piece, such as translation, circumstances of traditional performance, and accompanying movement or activity, should be shared with the performers during rehearsals and conveyed to the audience at the performance. *Seek authentic sources* is the fifth rule which concerns with the problem of authenticity in the arrangements of traditional music. The sixth rule, *learn the language,* means that one of the most challenging aspects of learning music form a new cultural tradition is learning to sing in a new language. *Teach authentically* is the seventh rule relating to the fact that encountering another musical culture provides an opportunity to learn traditional pedagogical approaches as well as new musical styles. The western model is totally foreign to most other singing cultures. And, finally, the rule *leave your comfort zone*, means that performing music of another cultural traditions demands much from the conductors in terms of study, preparation, and pedagogy. It also asks the conductor and performers to think in completely new ways, using new pedagogical methods, new languages, new ways of listening and new models of the role of the conductor (Parr, 2006, pp. 34-37).

One of the greatest benefits of studying a variety of musics comes from the expanded palette of sound possibilities that is set before children. Another reason for advocating a pluralistic study of music is to help students understand that there are many different but equally logical ways of making music. And one of the most important benefits derived from students studying representative examples of world musics is the gradual development of musical flexibility, labelled by some as *polymusicality*[1]. And finally, through multicultural musical experiences, attitudes are inevitably altered so that one becomes less prone to act negatively toward any music without first trying to understand it (Anderson, 1983).

In the multicultural music education the sound *per se* is the starting point for music education. Having absorbed the sounds that make up the music, children can be helped in trying to understand styles of the music itself.

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[1] Hood (1960) has coined the term *bimusicality* which means that some people have an understanding of, and are also proficient in, the technical requirements and stylistic nuances of two distinct musical systems. For educators, this means that it is possible for both teachers and learners to have meaningful engagements with more than one type of musical system. In a flexible application of the term, bimusicality allows us to understand different types of music-making in our society. Monson (1996) uses the term *intermusicality* to describe the phenomenon by which musicians can sometimes import specific practices and nuances form one style or performance context to other styles or performance contexts.

Conclusion

Education today calls for a multicultural approach. The most important reason for that approach is to meet the needs of a school population rich in diversity.

The task of teaching and learning art in the multicultural classroom is a challenge and opportunity for teachers and students. They learn how to respect and value each others' experiences and ideas and to incorporate these into the art program, how to be affirmed in their own cultures and how to expand their cultural knowledge through sociocultural investigations. They gradually become open to art forms, processes, and aesthetic values that may be quite different from their own. They learn how to discover the connections that bind us to others in the world, and how to gain an international perspective. Multicultural education is an opportunity to decrease negative stereotyping based on gender, race, religion, politics, age, ethnicity, and/or physical and mental ability.

As Goodking stated: "My hope in multicultural education is to honour diversity by going into the details of what sets one culture apart from another (cultural particularism) and to acknowledge unity by examining what universal qualities all cultures share (cultural pluralism). The combination of approaches used at my school highlights the points of intersection and divergence in the rich legacy of the world's musical expression" (1994, p. 43). The role of music pedagogy and music educators is to adapt the curricula and methods to meet the cultural backgrounds and needs of a heterogeneous student population.

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SOCIAL JUSTICE, EDUCATION AND SCHOOL SOCIAL WORK IN TURKEY

Abstract

This study focuses on welfare state, social justice and school social work interaction. In this paper, these three concepts' reflections in Turkey were mentioned. Researchers aimed to discuss how school social work (which is brought to the agenda recently) is important in the provision of social justice in Turkish public service delivery.

Introduction

Social work in Turkey has been left half a century behind and when we look at its practise fields, it is possible to see that those fields are developing differently from each other. For example, such fields like poverty, disability or clinical social work, have some settled practises but it is hard to say the same thing for school social work in our country. Nevertheless as a new social work field, school social work had developed first especially in the United States of America and the United Kingdom and also developed in some European and Eastern countries. It is known that school social workers are being employed at schools in these countries.

A Brief Overview of School Social Work

To understand the content and function of the school social work, it is necessary to define what school social work is. 'School Social Work is an important field of social work that located in schools to provide services, such as evaluating students' problems and needs; solving their problems about adolescence, success, family, friends and life conditions; helping students to maintain their educational activities successfully' (Duman, 2000, p. 35). As understood from the definition, school social work helps students with their development process, family profile and life conditions. Students' needs, problems they face in school settings and their solutions are the main issues for school social work. The main objective of school social work is to support solving pupils' psychosocial problems and increase their academic achievements by this support and by making educational environments more functional, to raise the quality of education.

It is considered that first practises in school social work started in the USA and England. The role of *school attendance officer* was born in England and over a century later, this role has evolved into *education welfare officer* or *education social worker*. In the USA, private agencies in three East Coast cities placed *visiting teachers* at schools to provide contact between home-school and promote school attendance. The role of the 'visiting teacher' developed a true social work approach (Huxtable & Blyth, 2002, p. 9). The title of 'school social worker' was adopted in the 1930s (Costin, 1969; Huxtable & Blyth, 2002, p. 9). Therefore, from the beginning of school social work, its goal is developing mutual understanding and collaboration between home and school (Özbesler & Duyan, 2009, p. 20).

It is known that the placement of school social workers within the school staff was in the 1900s. In Turkey, school social work practises have not yet started but it is possible to mention some efforts. Especially, some social problems which are increasing at school such as addiction, violence etc. in our country are requiring teamwork in school settings. Evidence, for this development is provided by the Children's Rights Strategy Document and National Action Plan of the Ministry of Family and Social Policy (2013-2017), where provision is made for initiating school social work until 2016 in Turkey.

Within the ecological system which regulates school social work; students located in school ecosystem interact dynamically with their families, teachers, environment and each other and also the community. Therefore, we need to handle students' problems and needs within the social environment in which they communicate and interact (Özkan & Kılıç, 2014, pp. 75-78).

The Relationship between Social Justice and School Social Work

Before discussing the relationship between school social work and social justice, it is important to mention about some concepts.

First of them is the term of 'state'. It is a concept with four hundred years of history and defined as *a form of government that determines state's intervention to social and economic life for public welfare and its methods.* A Welfare State can be defined with many goals, including social development, social justice, social peace, social stability, social integration, social democracy (Danış, 2007, p. 54). In this study, we aim to emphasize social justice – school social work interaction.

Social justice is one of the most important goals for states. It is defined as *possibility from country's resources and opportunities equally.* According to International Federation of Social Workers (IFSW, 2014) definition:

> Social work is a practice-based profession and an academic discipline that promotes social change and development, social cohesion, and the empowerment and liberation of people. Principles of social justice, human rights, collective responsibility and respect for diversities are central to social work. Underpinned by theories of social work, social sciences, humanities and indigenous knowledge, social work engages people and structures to address life challenges and enhance wellbeing.

As understand from the passage, the connection between social work and social justice is clear.

Correlatively, when we look at 'IFSW Code of Ethics' (2012), we see also a place given in that to social justice. According to the IFSW Code of Ethics, Article 4.2:

> Social workers have a responsibility to promote social justice, in relation to society generally, and in relation to the people with whom they work. This means:
> - Challenging negative discrimination: Social workers have a responsibility to challenge negative discrimination on the basis of characteristics such as ability, age, culture, gender or sex, marital status, socio-economic status, political opinions, skin colour, racial or other physical characteristics, sexual orientation, or spiritual beliefs.

- <u>Recognising diversity</u>*:* Social workers should recognise and respect the ethnic and cultural diversity of the societies in which they practise, taking account of individual, family, group and community differences.
- <u>Distributing resources equitably</u>: Social workers should ensure that resources at their disposal are distributed fairly, according to need.
- <u>Challenging unjust policies and practices</u>: Social workers have a duty to bring to the attention of their employers, policy makers, politicians and the general public situations where resources are inadequate or where distribution of resources, policies and practices are oppressive, unfair or harmful.
- <u>Working in solidarity</u>: Social workers have an obligation to challenge social conditions that contribute to social exclusion, stigmatisation or subjugation, and to work towards an inclusive society.

Similarly, according to Council of Social Work Education (CSWE, 2012)'s description: 'the purpose of the social work profession is to promote human and community well-being. Guided by a person and environment construct, a global perspective, respect for human diversity, and knowledge based on scientific inquiry, social work's purpose is actualized through its quest for social and economic justice, the prevention of conditions that limit human rights, the elimination of poverty, and the enhancement of the quality of life for all persons'. This also explains us social justice – social work intersection.

Certainly, not only social work, but also education has a privileged position for providing social justice. Actually, there is a two-sided relation between education and social justice. Firstly, a 'social justice – education discussion' about problems on reaching the right to education access which is one of the most significant resources of a country. Secondly, a 'social justice – education discussion' as a significant instrument about providing social justice.

Social justice in education can be approached from two dimensions. First one may be considered at macro level as individuals the right to equal participation whatever their ethnic, economic status and sexual orientation. Second one may be considered at both macro and micro level as pupil's deficiency in the right to education that comes from different sectors of society.

One of the most important functions of social work is providing each person opportunity to realize their own potential. When we look from education's point of view, for children outside the education system, deprived of education equality and those forced to leave the school, social work services in school settings are significantly important. When we think in the context of social justice, such services should be seen as essential instruments for welfare states' goal of social justice.

The right to education is also legislated by Constitution of the Republic of Turkey. Referring to Article 42: 'education is compulsory for all citizens of both sexes and is free of charge in state schools. The State shall provide scholarships and other means of assistance to enable students of merit lacking financial means to continue their education. The State shall take necessary measures to rehabilitate those in need of special education so as to render such people useful to society' (Constitution of the Republic of Turkey, 1982). Considering Turkey's enrolment rates, it is seen that Turkey was in the last place among OECD countries by 2011. By the age of 5-14, Turkey's enrolment rate is 91.3% compared to OECD's 98.6%

enrolment rate (OECD, 2011). Also, enrolment rate at the age of 14-19 is important. This age group is seen as the entrance into the labour market and strongly focused on across the world. Similarly, by the age of 14-19, only out passing China and Mexico, Turkey is antepenultimate with 62% enrolment rate compared to OECD average of 82% (Şimşek, 2013). With the education share inside Gross National Product (GNP), Turkey is in the lowest places among OECD countries.

A field research's results by Gökşen, Cemalcılar & Gürlesel (2006) about drop outs at primary school includes: Drop out mainly occurs in fifth and sixth classes. Especially for girls, parental pressure is an important factor. When it comes to family parameters, mother's education level and economic status are significant on family breakdown.

Looking from a wider perspective, Kopels (2007, pp. 288-289) expresses that many children coming from disadvantaged groups are less likely to benefit from right to education equally. Kopels emphasizes the necessity of 'school social work' and the following points:

- To become conscious about students with diversities, especially for teachers, is important. Beside this, expressions involving discrimination should not be used in school settings.
- Counselling and case management for both students and families will be useful and these should be integrated into school system.
- Activities which gather student and whole school personnel will help people understand each other; so, such activities should be organized.
- In addition, performing works or studies related with access and continuance to education are also important for quality of education and student achievement.

Franklin & Harris (2007, pp. 331-340) describe social workers' roles in school settings in detail. They emphasize planning the most appropriate interventions for different kinds of groups. Franklin & Harris determine school social workers professional roles. These include: 1) Consultant, 2) Clinical Interventionist, 3) Enabler and Facilitator, 4) Collaborator, 5) Educator, 6) Mediator, 7) Advocate, 8) Diversity Specialist, 9) Manager, 10) Case Manager and Broker, 11) Community Intervention, 12) Policy Initiator and Developer.

Results and Evaluation

One of the most significant roles of governments is providing equal right to education for every child as an important indicator of social justice. According to OECD, Turkey has a low level of school attendance statistics. For a solution of this problem, to minimize school dropout risks and also to make schools more effective for students, school social work is essential to welfare, in the final analysis. In that way: it is most important to bring school social work into action in Turkey. Whereby, with the help of social work interventions and efficient use of school social workers' roles, to deal with many problems – including those mentioned in this study – Turkish society will move forward.

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GOVERNMENT EXPENDITURES ON EDUCATION AS THE PERCENTAGE OF GDP IN THE EU

Abstract

This paper analyzes the government expenditures as the percentage of gross domestic product across countries of the European Union. There is a statistical model based on Z-score, whose aim is to calculate how much each EU country deviates from the average value. The model shows that government expenditures on education vary significantly between EU countries.

Key words: education, GDP, European Union, Smart specialization

Introduction

The European Union today is faced bynumerous interrelated and complex challenges. The consequences of the global crisis can be felt in all countries of the EU. In the context of this financial and economic crisis, education systems must ensure that all citizens of the European Union are equipped with the knowledge, skills and competences needed to meet the challenges of their future work place. Because of that, it is very important that all governments of EU countries invest in education. Government investment in education is usually represented by the economic measure called government expenditure on education as the percentage of gross domestic product (GDP). It shows the share of all government expenditure that is spent on education. Higher levels of this measure usually mean the better the education system.

Literature overview

There are not many papers focusing on this topic, but here three papers that have analyzed the importance of education and investing in it are analysed.

Moonwon Kang (1993) analyzed the returns to education of government investment. Based on the view that education is partly a superior consumption-good generating higher status, the author indicates that the measured rate of return to education, ignoring utility benefits from education, is generally an underestimated indicator of the real rate of return. Further, he indicates that, in developed countries where utility benefits are much larger, the rate of return is more heavily underestimated than in developing countries. Moonwon Kang proposes this as another reason why the observed rate of return is much higher in lower developed countries than in developed countries.

Kuhl Teles and Andrade (2008) wanted to visualize the relation between government spending on basic education and the human capital accumulation process, observing the impacts of this spending on individual investments in higher education, and on economic growth. They have used an overlapping-generations model where the government tax the adult generation and spent it on the basic education of the next generation. It demonstrated that the magnitude of the marginal

effect of government spending in basic education on growth crucially depends on public budget constraints.

Nir and Kafle (2013) analyzed the effect of political stability on public education quality. The purpose of their paper is to provide a preliminary analysis to evaluate the implications of political stability for educational quality, evident in the survival rate measure. Authors have conducted the secondary analyses from data drawn from the Political Risk Service Report, the World Bank Report, the United Nations Report and the OECD Report, using a sample comprising 47 countries, (26 politically stable and 21 politically unstable) during a ten-year period (1998-2008). The study revealed that political stability plays a major role in explaining the survival rate in education when used as a single predictor or, when introduced in the analysis with per capita GDP. Following previously reported findings suggesting causal relations between high economic growth and regime stability, the authors' analyses show that as far as educational quality is concerned, political stability plays a far more significant role compared to countries' economic circumstances evident in the per capita GDP.

Methodology

Public expenditure on education as % of GDP is, according to the World Bank definition, the total public expenditure (current and capital) on education expressed as a percentage of GDP in a given year. Public expenditure on education includes government spending on educational institutions (both public and private), education administration, and transfers/subsidies for private entities (students/households and other private entities). The values are calculated by national bureaus of statistics of each member country of the European Union. All the data for EU member countries is collected and grouped by Eurostat, the statistical agency of the European Union.

The data about the percentage of GDP invested in education is analyzed using statistical tools, in order to conclude which EU counties arecloser to the average value, and which arefar from it. For this analysis, the Z-score method has been used. It is the method that compares the data between different units, in this case countries, according to the average value and the standard deviation.

Cross country analysis

Expenditure on education is a very important factor of an economy because it has numerous aspects which it may influence. It can help to increase economic growth, enhance productivity, and contribute to people's personal and social development. The latter is also important as it can help reduce social inequalities. The proportion of total financial resources devoted to education is one of the key choices made by governments in each country of the European Union. The data below shows government expenditures on education as % of GDP in 2011.

Government expenditures on education on the level of the European Union are about 5.3% of GDP. As a ratio to GDP, the highest levels of government expenditure on education among the EU countries were found in:
-    Denmark (7.79% of GDP);
-    Cyprus (7.18% of GDP);

- Sweden (6.79% of GDP);
- Slovenia (6.67%);
- United Kingdom (6.51% of GDP).

The lowest ratios of government expenditure on education to GDP were observed in:

- Bulgaria (3.63% of GDP);
- Slovakia (4.04% of GDP);
- Romania (4.13% of GDP);
- Greece (4.08% of GDP);
- Italy (4.24% of GDP).

In some of the leading countries of the EU, like Germany, government expenditure on education was below average.

The highest government expenditures on pre-primary and primary education were found in Denmark (3.93% of GDP) and Sweden (3.91% of GDP), and lowest in Czech Republic (0.55% of GDP) and Bulgaria (0.71% of GDP). The average value of government expenditures on pre-primary and primary education was 1.69% of GDP.

Regarding secondary education, the highest government expenditure is in Finland (2.87% of GDP) and Czech Republic (2.73% of GDP), and the lowest in Sweden (1.25% of GDP) and Poland (1.54% of GDP). The average value of government expenditures on secondary education was 1.99% of GDP.

Government spendingon tertiary education were highest in Finland (1.79% of GDP) and Estonia (1.60% of GDP), and lowest in Luxembourg (0.32% of GDP) and Italy (0.38% of GDP). The average value of government expenditure on tertiary education was 0.86% of GDP.

Looking at the EU-27 general government expenditure on education from 2002 to 2011, two trends are obvious (Eurostat). The first trend is the percentage of GDP for education in the European Union, which followed a declining trend from 2002 until 2007 and then increased sharply from 2008 to 2009. Then lower public investment contributed to a decrease of 0.2 percentage points of government education expenditure in terms of GDP from 2009 to 2011. The other trend is the total government expenditure for education, which shows constant growth from 2002 to 2011.

Crisis influence on government expenditure on education

Investment in education is set as the priority area in EU's growth strategy Europe 2020. In the face of the current economic challenges, it is essential for the promotion of sustainable growth. Investing in education, training and lifelong learning supports the development of human capital to enhance employability and, in particular, tackle and prevent youth unemployment (European Commission, 2013). However, the economic crisis and the subsequent increase in budget deficits and debt levels demand fiscal consolidation to bring countries of the EU in line with the requirements of the stability and growth pact. Hence, public spending on education is under pressure in this consolidation process.

Government expenditures on education have significantly changed in some EU countries between 2012 and 2013. In the great majority of the countries, government expenditure oneducation for 2013 has increased by more than 1%, compared to the

education budget for 2012. There are also some countries in which there was a decrease of more than 1%, whilst, some countries' expenditure on education for 2013 compared to that for 2012 remained stable, i.e. it increased or decreased by less than 1%.

Differences in the European Union

Although education policies and economic policies in the countries of the European Union tend to be similar, it is obvious that the percentage of GDP allocated to education varies significantly across the EU countries. The following statistical analysis aimsto show how big thesedifferences are.

The differences between EU countries are analyzed using the Z-score method. This method calculated Z-scores for each country, using the average value and the standard deviation. The value obtained in this way shows how much each country differs from the average in the terms of standard deviation.

The Z-score for all EU countries is presented below:

Country	% GDP	Z-score
Belgium	6.18	0,6200
Bulgaria	3.63	-1,6630
Czech Republic	4.89	-0,5349
Denmark	7.79	2,0614
Germany	4.26	-1,0990
Estonia	6.48	0,8886
Ireland	5.25	-0,2126
Greece	4.08	-1,2601
Spain	4.74	-0,6692
France	6.05	0,5036
Croatia	3.48	-1,7973
Italy	4.24	-1,1169
Cyprus	7.18	1,5153
Latvia	5.73	0,2171
Lithuania	5.82	0,2977
Luxembourg	5.09	-0,3559
Hungary	5.18	-0,2753
Malta	5.82	0,2977
Netherlands	5.77	0,2529
Austria	5.56	0,0649
Poland	5.56	0,0649
Portugal	6.35	0,7722
Romania	4.13	-1,2153
Slovenia	6.67	1,0587
Slovak Republic	4.04	-1,2959
Finland	6.38	0,7990
Sweden	6.79	1,1661
United Kingdom	6.51	0,9154
Average	*5.48750*	
St. dev.	*1.11696*	

From this data we can observe where each country is compared to the EU average, regarding their government's expenditure on education as the percentage of GDP. Positive values mean that the country is above average, while negative values represent countries that are below average. The largest absolute value of Z-score means the largest deviation from the average of the European Union.

All EU countries can be divided into two groups on the criteria of positive/ negative value of Z-score.

EU countries above the average are:

1. Denmark   Z-score: 2,0614
2. Cyprus   Z-score: 1,5153
3. Sweden   Z-score: 1,1661
4. Slovenia   Z-score: 1,0587
5. United Kingdom   Z-score: 0,9154
6. Estonia   Z-score: 0,8886
7. Finland   Z-score: 0,7990
8. Portugal   Z-score: 0,7722
9. Belgium   Z-score: 0,6200
10. France   Z-score: 0,5036
11. Lithuania   Z-score: 0,2977
12. Malta   Z-score: 0,2977
13. Netherlands   Z-score: 0,2529
14. Latvia   Z-score: 0,2171
15. Austria   Z-score: 0,0649
16. Poland   Z-score: 0,0649

This list shows countries of the European Union whose governments invest in education more than the EU average. Denmark is the country that has the largest investment in education from all EU countries, measured as the share of GDP. Its value is 2.06 standard deviations higher than the EU average. According to statistical theory, this value can be regarded as an untypical value, because it is more than 2 standard deviations from the average. Denmark is followed by Cyprus, Sweden and Slovenia. Altogether, 16 countries of the European Union have government expenditure on education above the average.

EU countries below the average are:

1. Ireland   Z-score: -0,2126
2. Hungary   Z-score: -0,2753
3. Luxembourg   Z-score: -0,3559
4. Czech Republic   Z-score: -0,5349
5. Spain   Z-score: -0,6692
6. Germany   Z-score: -1,0990
7. Italy   Z-score: -1,1169
8. Romania   Z-score: -1,2153
9. Greece   Z-score: -1,2601
10. Slovak Republic   Z-score: -1,2959
11. Bulgaria   Z-score: -1,6630
12. Croatia   Z-score: -1,7821

This list represents the countries of the European Union that have government expenditure on education below the EU average. There are 12 countries in this

category. The worst position is that of Croatia, which is 1.78 standard deviations under the average value. It is followed by Bulgaria, Slovak Republic and Greece.

Recommendations for the future

Education is essential for every country, for each citizen, it is the key element for the civilization of human society. It is the base for the social, economic and political development of a country. This is the main reason why countries invest in education. They all want to utilize the positive effects of education. The European Union is often regarded as the society of knowledge, and the basis for knowledge is a good and high quality education system.

Government expenses on education can be analyzed on various levels, depending on the level of education: primary, secondary and tertiary education. Primary education is important as the basic education for each person, secondary education is important for professional level development, and tertiary education is focused on specialization and on research and development. Tertiary education is the one from which innovation emerges. Because of that, it is very important to invest in tertiary education.

Currently one the most popular topics in tertiary education is the implementation of 'smart strategy' in universities. It is one way of financing tertiary education, but not directly from the central government. There was an agreement that universities and regional authorities have a unique opportunity to form close partnerships that, together with industry and other stakeholders, can maximise the use of EU Structural Funds for research and innovation to deliver economic and social development. From the perspective of universities, it is vital that there is more clarity on how they can benefit from the Structural Funds and how to achieve a greater synergy with competitive EU research funds (Horizon 2020). One way to start addressing these issues is through the design of Research and Innovation Strategies for Smart Specialisation (RIS3).[1]

According to the European University Association, universities should be recognised as a vital partner for regions in the design and implementation of successful RIS3. Universities can benefit from Structural Funds for research and innovation (R&I) activities if they reach agreement with regional authorities on priorities for the region. For regions, the benefits should not be simply new infrastructure in physical terms but also importantly in investment in human capital development and services to the region.

Conclusion

This paper has analyzed the government expenditure on education in the European Union regarded as a   percentage of the gross domestic product. The analysis has shown that the percentage value of GDP invested in education varies between EU countries from 3.50% to 7.79%. The model showed that 16 EU countries invest in education more than the average, while 12 EU countries invest less than the average. Each EU country that is below the average should invest more

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[1] Report on joint EUA-REGIO/JRC smart specialisation platform expert workshop: The role of universities in smart specialisation strategies.

in education. However, investment in education can also come from different sources. Smart specialization is one of the good examples of collaboration between universities and local authorities, and the financing comes from the EU funds. In the future it will be interesting to analyze how government expenses on education change through years, and if there are other significant sources for investments in education.

Acknowledgement

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TEBELLO TLALI & LYNETTE JACOBS

TEACHING AND ASSESSMENT PRACTICES AT THE NATIONAL UNIVERSITY OF LESOTHO: SOME CRITICAL COMMENTS

Abstract

This paper explores the teaching and assessment practices of some lecturers at the National University of Lesotho in view of the negative perception that was created in the press and also suggested in limited research findings about quality-related issues. We adopted a qualitative approach and drew from Constructivism's theoretical lens to appraise the teaching and assessment practices at this institution. We interviewed one lecturer from each of seven faculties, and analysed samples of papers provided by them. Findings suggest that lecturers are mostly overwhelmed by overcrowded classes and poorly equipped lecture halls, together with a lack of training regarding teaching and assessment and are generally content driven in their teaching and assessment approach. We propose that the institution address these deficits by strengthening its staff development and support programmes.

Introduction

Since its founding in 1975, the National University of Lesotho (NUL) has, for many years, been the only university in Lesotho. Despite the establishment of a Malaysian Limkokwing University satellite campus in 2008, NUL has continued to cater for approximately 65% of students in the Lesotho higher education sector. With the massification of higher education taking place globally, NUL has also had a 116% increase in student enrolment between 2003 and 2010 (Biggs & Tang, 2011; Mahao, 2003; Tlali, 2014). In the midst of this development, NUL has envisioned promoting quality and innovative teaching and learning, and establishing quality benchmarks in teaching. This is articulated in its vision (National University of Lesotho, 2007, p. 21):

> NUL's vision is to be a leading African university responsive to national needs; committed to high quality teaching, life-long learning, research and community service, respected nationally and internationally.

However, the criticism and negative publicity that NUL has received in the media recently suggest that the institution is struggling to uphold this vision. According to Motsoeli (in *Lesotho Times,* 2011), the former NUL Vice Chancellor has indicated that the institution is experiencing serious problems which include the high rate of student failure. It is contemplated that, among other things, the high failure rate is due to a lack of quality teaching. A similar view is reiterated by Lloyd (in *Public Eye,* 2012, p. 1) who harshly writes:

> Only a visitor from outer space is not aware of NUL's myriad of problems: ... staff who read notes to students instead of engaging them and do not allow students to ask questions in class...

While it must be acknowledged that the media sometimes provide a distorted view of reality (Jacobs, 2014), similar concerns are raised in the few studies available on Lesotho's higher education. Mahao (2003) argues that NUL struggles to provide quality education amidst the escalating student enrolment and scarce

teaching and learning resources, while Nyabanyaba *et al.* (2012) indicate that there are high levels of inefficiency in Lesotho higher education. In addition, the Ministry of Education and Training (MOET), as well as the Council of Higher Education of Lesotho (CHE) both acknowledge that fostering quality learning is one of the biggest challenges facing Lesotho higher education (MOET, 2005; CHE, 2010).

Quality learning is associated with deep learning. Two contrasting learning approaches were originally conceptualised by Marton and Saljo in their 1976 study that examined students' approach to a particular task (Biggs & Tang, 2011; Smith & Colby, 2007). When asked to read a text in preparation to answer questions, the participating students adopted two different approaches. Some tried to understand major ideas in the passage, focusing on comprehending the passage (deep learning), while other students focused on what they thought would be asked and demonstrated a superficial interaction with the learning material (surface learning). Towards promoting deep learning, Constructivism has become a dominant theoretical perspective in educational debates, especially in the field of teaching and learning (Kivinen & Ristela, 2003; Vanderstraeten, 2002). This theoretical perspective is associated with metaphors of *building* or *construction* which are used to illustrate how learners acquire and internalise knowledge. Educators who seek to improve their teaching in order to meet the requirements of the constructivist approach and the promotion of deep learning, are advised to use taxonomies such as the Revised Bloom's taxonomy and the Structure of Observed Learning Outcome (SOLO) taxonomy to critically understand and examine the depth of teaching and learning (Biggs & Tang, 2011; Bumen, 2011; Smith & Colby, 2007).

Constructive alignment, based on Constructivism, is a teaching and assessment design which seeks to align or link the different components of the teaching and learning environment with the view to optimise the teaching and learning outcomes. This learning design is based on the conviction that the learners use their own activities to construct their knowledge (Biggs & Tang, 2011, p. 97).

With regard to the scarcity of research on the teaching practices at NUL, and the concerns raised about quality, we aim to provide critical comments in this study about the teaching and assessment practices at NUL[1], using the above benchmarks of deep learning, constructive alignment and learner-centredness. We will first explore the teaching and assessment practices at the institution and thereafter juxtapose them with the literature from higher education studies elsewhere.

Research design and methodology

We used a generic qualitative research design (Merriam, 2009), engaging with people whom we viewed to be most knowledgeable about the teaching and assessment practices at NUL, namely lecturers as participants in the project. First we explored the experiences, practices and perceptions of lecturers with regard to teaching and assessment at NUL using semi-structured interviews (Perry, Thurston & Green, 2004), followed by a content analysis of assessment instruments employed by the interviewed lecturers (Strydom & Delport, 2011).

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[1] This paper is the first of a series of three papers in which we explore different aspects related to quality teaching and learning at NUL. We intend to follow it up with a paper focusing on student learning and one on institutional factors.

We interviewed seven lecturers, four females and three males – one participant each from the Faculties of Health Sciences, Social Sciences, Humanities, Law, Education, Science and Agricultural Sciences respectively. The teaching experience of these participants varied between two and eighteen years. Two of them had formal teacher training.

We gave due consideration to obtaining the required permission to protect the dignity of the participants and to ensure confidentiality (Cohen *et al.*, 2011). No coercion took place and participants were advised that they had the right to withdraw from the research whenever they wished to do so (Diener & Grandall in Cohen *et al.*, 2011). The interviews with the lecturers were recorded and transcribed. We furthermore employed strategies, such as respondent validation, triangulation, direct quotations from the qualitative data and external auditing to increase the trustworthiness and authenticity of the research (cf. Merriam, 2009; Mertens, 2010).

Findings

We focused our findings, in terms of the two issues that were explored, on namely, the teaching and assessment practices at NUL.

Teaching practices

We started the interviews by enquiring about how lecturers prepare. All the participants indicated that when preparing for their teaching, they usually start with 'reading and searching the internet for the latest information' on their respective disciplines. This also involves 'preparing course outlines[2] at the beginning of the academic year or semester'. In addition, some participants attested to looking for 'course-outlines from other institutions for benchmarking'.

However, it seems that majority of the lecturers do not state objectives at graduate level, programme level or unit level. One respondent said that she 'states objectives only in the course outline', since 'it is not clear what is required' of her. Seemingly, objectives are not fore-fronted, as expressed by one lecturer participant:

> I must confess that I tend to forget that at the end of the topic or at the end of the lesson I should still go back to my objectives to determine whether they have actually been achieved.

With regard to the selection of the teaching methods, participants differed in their practices. Some participants reported that whilst they mainly use the lecture method, they 'try to make it interactive by integrating some questions and answers' into it. Others attested to often using the case-based method of teaching. One participant clarified that:

> In my teaching, I focus on making real life examples and solving real life problems; I focus on the application of a particular content. They [the students] have to solve real life problems. I try to incorporate practical examples of real life situations.

One participant was particularly articulate in the way she explained her choice of teaching methods. She pointed out that she uses a variety of teaching methods,

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[2] A course outline is a brief learning guide which includes a course synopsis, the aim and objectives, the topics to be covered, the teaching and assessment methods, as well as the prescribed reading materials.

rather than just the lecture method. She also pointed out that she 'consciously avoids situations where students would just sit and absorb whatever she tells them and later reproduce it'. Instead, she 'allows them to do research on their own on assigned topics and then they share the information with the rest of the class through class presentations'. She also assigns them 'group work'. In further stating her rationale for using group work, she emphasised that:

> … when some of them understand… it makes my job very easy because then they are able to explain to each other and learn from their peers and they understand better, faster.

However, there are some participants who still only use the lecturing method in the traditional sense (where they do more of the talking with little or no student activities). They cite large numbers as the main reason for resorting to this practice. One participant explained that:

> You see the way we teach, you have to stand in front of a huge group and there are no projectors, no system to assist you to do it in a way that you feel comfortable that you have covered everything to the depth that you wanted. Sometimes it becomes a pain to teach large classes without such facilities.

Another participant acknowledged that due to the big numbers one is not able to give one's best. For instance, 'one just wants to get the job done'. One participant indicated that there is indeed a great need for professional training: 'This would help us in the way we prepare our lectures, everything pertaining to teaching for us non-teachers…'.

It seems some participants use selected teaching methods which promote deep learning, such as interactive lecturing, group or collaborative learning and problem solving, yet the traditional lectures seem to be a more common method.

Assessment practices

In response to our question, the participants indicated that they give students a combination of tasks which require both knowledge and application. One participant confirmed that in her assessment she 'combines some knowledge and application questions', stressing that she puts 'more focus on application questions'. However, she contradicted herself by revealing that her distribution of assessment tasks carries more knowledge tasks and fewer application ones, i.e. 'something like 25% to application and 75% to knowledge'.

Another participant also pointed out that she follows a similar trend, and when asked to define how she distributes the assessment tasks in relation to the different levels of the learning taxonomies, she indicated her 'own assessment is more dominated by knowledge questions and remembrance'. She further added that sometimes she goes 'into application, [though] not all the time'. Another participant added that she would ask students 'one question that requires them to analyse and three questions that just cover generally what was discussed in class'.

When we analysed samples of test and examination papers that the participants provided to us, it confirmed an emphasis on content. Of the 10 examples of papers (4 test papers and 6 examination papers) that the participants were willing to share, only 2 had a higher percentage of higher order questions (50% and 60% respectively, based on the revised Bloom's and SOLO taxonomies). The rest of

papers in the sample had a higher percentage of low order questions, and one of them had 100% of low order questions.

Nevertheless, one participant (with an education qualification) appeared to do things differently. She stated that in her assessment she considers the 'learning taxonomies'. She explained that:

> Taking the Bloom's taxonomy of educational objectives, I try to ask questions which allow students to engage their mental faculties at a higher level. I ask evaluation questions where they analyse stuff, where they apply stuff. I do not ask simple recall questions.

Discussion

Constructive alignment focuses on linking the intended learning outcomes, learning content/curriculum, the teaching/learning activities and the assessment tasks. In line with this, authors, such as Carnell (2007) and Hornby, Jennings and Nulty (2009) emphasise the importance of a student-centred approach, where the emphasis is on what the students do, instead of what the lecturer does, so as to actively involve students in their own deep learning. Nevertheless, the teaching practices at NUL remain mainly traditional. The NUL lecturer-participants indicated that not enough emphasis is placed on learning outcomes and that they themselves tend to forget to consider them. If this alignment aspect is not foregrounded in the majority of the teaching practices, then it cannot be ensured that the learning objectives are indeed achieved.

Constructivism is enhanced by the use of learning taxonomies, since these are useful in articulating the desired behaviours that should be elicited from the learner. They help educators to analyse the effectiveness of their teaching in terms of what students actually learn, i.e. what knowledge and skills are to be acquired/constructed and the cognitive processes employed (Vojtko & Heskova, 2010). However, only one lecturer-participant referred to the learning taxonomy.

The literature indicates that assessment plays an important role, since it determines what students learn, and how they learn it (Reid, Duvall & Evans, 2007; Van Tonder, Wilkinson & van Schoor, 2005). Thus, in order to promote deep learning, the focus during assessment should shift from declarative knowledge; what textbooks and educators 'declare' and which is usually assessed 'declaratively' by allowing students to 'declare' it back, to functional knowledge which underpins actions, and can be applied in a concrete context, such as in problem-based learning (Biggs & Tang, 2011; Tek-Yew, 2011). In contrast to this, test and examination papers that we analysed revealed a focus on mainly lower order tasks, rather than higher order tasks.

Conclusion

Quality higher education can be achieved only by ensuring a shift from surface to deep learning. Currently at NUL, deep learning may indeed be jeopardised *inter alia* by poor teaching and assessment practices of lecturers. It became evident that lecturers need to be exposed to theoretical perspectives that support the constructivist view, and also to practices that promote deep learning. They specifically need to be supported in terms of teaching and assessment for deep

learning; clear guidelines for the development of study material; and to overcome the challenges that they face of overcrowded and poorly equipped lecture halls. We note the recent developments[3] at NUL to equip lecturers with teaching techniques. However, given the significance of the findings, it is our contention that the situation will not be easily turned around. As such NUL needs to take note of the findings of this study, and improve policy and practice towards the achievement of deep learning in the endeavour to become 'a leading African university responsive to national needs; committed to high quality teaching…' as captured in its vision statement.

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AMELIA MOLINA, JOSÉ LUIS ANDRADE & CHRISTIAN PONCE

THE FLEXIBILITY OF THE CURRICULUM AS A STRATEGY FOR EXERCISING SOCIAL JUSTICE IN PUBLIC UNIVERSITIES

Abstract

This paper is guided by two principal ideas, the first one is about curriculum flexibility in the context of globalization and the second one is about the function of generating skills for the job market. Both are challenges that the Institutions for Undergraduate Education (IES) have to face in training their alumni. In this case we considered as a point of reference some aspects from the Science in Education Program of the Autonomous University of Hidalgo (UAEH).

Key words: Education Flexibility, Undergraduate Education, Globalization, Curriculum Justice

Introduction

If we consider as a basic principle that one of the fundamental tasks of undergraduate education is training social actors for the job market and for the exercise of their citizenship (among other functions), we cannot ignore the social justice factor as an aspect of the training process where equal opportunities are promoted and (from a Human Rights perspective) the promotion and development of skills that allow the creation of ethical principles in the youth who are trained in the classrooms. This would enable them to aid, through their daily activities, the advancement of a more equal world.

Latin America, like other countries from the European, African and Asian Continents, has been immersed in globalized processes that are promoted by multinational companies, phenomena that has been studied by several experts in the field (Castells, 2000; Hopenhayn & Ottone, 2001; Tedesco, 2000; Brunner, 2000; Giddens, 2000, inter alia). Their results have shown that we are living in a new postindustrial age, that the economy and the society of knowledge are opening new production paths (post-fordism), in which money and job factors still predominate as essential elements of the production process. One of the tendencies pointed out by these authors is that knowledge and new network based production organization, is trying to rule the current production scenario. This implies a new way of production organization (like *toyotismo*) determined by a flexible specialization, also called productive flexibility.

The recognition of globalization as a process that traverses a certain time period in which new perspectives of life, education, economy and work have emerged, also means facing new ethics and values globally constituted and linked to individualism. Such effects of globalization have their major expression in the access to markets without boundaries and standardized local consumptions. Or as David Harvey (2006) expresses: globalization, as well as neoliberalism, defends greater privatization with the resultant loss of government provided social services.

For this reason, the globalization conditions joined by the society of knowledge represent a challenge to formal education (especially for undergraduate studies),

while we are trying to defend knowledge that responds to the market needs, but that also promotes alternative values to the hegemonic system and its cultural consequences, drawn under the postmodernism blanket.

In this sense of things, the adjustments, modifications, and reformulations of the undergraduate education programs acquire especial importance. For that, we are analyzing the role of education flexibility before the transformations that globalization has imposed, particularly with changes to academic, curricular and procedural structures. Also analyzing how the educational field had to adapt to changes of job and economic markets (market flexibility and new skills), as a consequence of a new economy (knowledge economy); this in the public universities context.

Globalization as a context for flexible curriculum

Globalization is a process through which new perspectives of life, education, economy, and work have emerged. It results in new ethics and values, globally constituted and linked to individualism. It has its major expression in the access to markets without boundaries and standardized local consumptions. This represents a challenge to education because of the proposal, not only of a new system for content management and pedagogical methodologies, but also of alternative values for this hegemonic system and its cultural consequences drawn under the postmodernism blanket.

In accordance with Diaz-Villa & Nieto (2012), globalization and post-modernism imply a new economic regime and sociocultural processes (a new type of logic) expressed in new ethics, ways of being, learning, making, teaching, and consuming that go beyond space-time limits. They imply social, scientific, technologic, educational, and cultural transformations that share life diversity as a common characteristic. Globalization has spread the ideology of a common well-being, burying the glorious idea of duty (Lipovetsky, 2002).

Conversely, the increased development and usage of information and communication technologies (ICT) for production and services have made possible another kind of access to information and culture, transforming classic ways of production and establishing, little by little, new ways of production organization (flexible specialization[1] or productive flexibility) and of business organization (market readjustments), as well as new job ethics.

In this line of thought and in accordance with Richard Sennet (2000), current capitalism emphasizes flexibility and attacks rigid forms of bureaucracy and the evil of blind routines. Workers are asked to possess an agile mind and to be open to changes, to accept one risk after another rather than following a straight professional career path for their entire lives. The argument presented being that, flexibility leads people being freed to choose or shape their own lifestyles.

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[1] The term flexible specialization (*post-fordism*) implies the end of massive standardized production (*fordism*), turning it into consumption preference changes, this is, changing from a producer economy to a consumer economy (Cocco & Vercellone, 2001: 3).

Curriculum flexibility as a way of producing knowledge

Based on previous context, knowledge (current productivity pillar) mostly rises from research activities and these activities take place principally at universities. In this sense, globalization definitely impacts education, particularly the curriculum aspect, because that is where the necessary elements for productive activity are formed (human capital), knowledge generation, and economic development, especially if productive flexibility has been transforming work activities.

Flexibility has always been present in education and may be viewed from different perspectives. For example, as a remover of limits, or as a provider of choice. It is manifested by changes such as removal of rigid structures and a provision of a system where versatility, elasticity, openness, agility, adaptability are driving forces and a module based structure is often used (Diaz-Villa, 2011). However, flexibility is a relational principle that can be present in any type of organization or distribution, and in different social relationships. From this perspective flexibility is about relations and the possibility of social transformation; it forms part of a structure and establishes a flexible power relationship .within that structure. Therefore, every relation presupposes limits, boundaries, differences between its subjects, produced contents, organization, and societal relationships. The strength of the limits marks the differences and the identity of the subject in question: asymmetrical relations are reproduced or, equal or unequal conditions are promoted.

It is possible to find curricula which prioritize content, ignoring the importance of social relations not considering the particular characteristics of the subjects being trained, or their need for life long education.

Skills in the flexibility field and the market

Currently, we are immersed in a conception where the productivity impulse is dominated by knowledge, the employee's expertise, the human talent, and their results (performance). There is the appreciation of human work combined with the use of technology... These conditions are making the difference, in the context of an organization (a company, or a social, private or public institution) that is valued and recognized for being competitive, demonstrating a difference between the modern skilled workforce and yesterday's workers who relied on hard work not technology.

To be competent companies have to constantly adjust and continuously learn how to adapt to change (Vargas et al, 2001). That is why they tend to observe and evaluate the capacity and performance of workers (job competence) under certain productive conditions (performed tasks); their knowledge, skills and abilities combined with their own personal characteristics (communication, comprehension, processing and information usage, negotiation, and assistance to clients). That is how job competence is visualized as the element that enables a worker to obtain successful results, accomplish goals, objectives and solve problem that may arise in work (as an individual's action resulting from knowledge) (Nieto & Diaz-Villa, 2008.) Therefore, the skills and their development are identified with guidelines, values and conduct patterns of workers in social interaction, and are visible in production results.

Current professional training, influenced by changes produced in a so-called postindustrial society of information or knowledge (Giddens, 1996), suggests responding to the challenges presented by new conditions of flexible working activity, rather than depending on known and routine situations but on emergent conditions that require innovation and learning, so as to produce intelligent answers to new and unknown problems in the new flexible job market (Diaz Villa, 2006). It requires an interconnected relation between academic, professional, and labor fields.

In such a field relation, it has been hard to deal with, or even more, to make clear in a curriculum program the difference between skills, competencies, performance, professional skills, and work skills. To clarify this problem we have to remember that the notion of competence arose in the labor and economic fields and has been adopted into the academic field. A *skilled worker* is the one that includes knowledge, skills, abilities, previous experiences, and comprehension of the process which he/she is taking part. A skill is acquired in performance (it is not taught) and developed by an individual or a group. It is activated in performance and practiced in a social interaction context and it results in competencies in contact with social and professional contexts (Nieto & Diaz-Villa, 2008).

According to Nieto & Diaz-Villa (2008), skills are associated with a person's knowledge or learning objectives (it is inherent to people), therefore they are characteristics of the person involved hence it may be inferred that skills are not taught but developed, noticed in performance (specific actions), in different social interaction expressions and seen in results and evidence.

Competence is the individual action that results from knowledge and social interaction, and skills are in fact performances indicated by guidelines, values, and conduct patterns in changing contexts from singular (competence) to plural (skills development).

Skills as guidelines for flexible curriculum design

Such professional skills can be included in a curriculum and joined by desired work skills. It is not convenient to restrict a curriculum to work skills, because this can lead to a dependent relation between the university and the work market. The most convenient thing to do is to identify that professional skills, IES needs to generate the necessary conditions for professional and work skills development which may lead individuals to have a successful performance in the job market.

Undergraduate education, therefore, must assure certain basic learning including generic skills for life, differentiating between essential and desirable learning by developing the proposal of learning how to learn and teaching in a way that aids skill development, and encourages the application of knowledge. As Cesar Coll (2007: 37) says:

[…] to acquire and develop a skill – as well as developing a capacity – we have to absorb and own a series of knowledge associated with it, besides, not instead of, learning how to move and apply them.

Skills development has turned into a principal matter, or perhaps a fashion, in the making of curricula, and generally it goes together with the notion of *flexible training* for the job market. This is where a diversity of learning modalities is promoted, giving greater independence and versatility to students. It demands from the school a new administrative, academic, teaching, and curriculum organization.

These new ways of relating and building knowledge "had represented a change to professional training, from an education based in academic contents (encyclopedic) to an education centered in problems and processes, this is, to a more contextualized (specific) education" (Diaz-Villa, 2011: 21), they necessarily imply the changing of the learning process, from a traditional model of vertical hierarchical organization (focused on the teacher) to a model based in auto-control and self-organization from students.

To Diaz-Villa (2011), the curriculum based on training and development of skills has to do with a relation between activity, context, and sociocultural interaction, since skills result from performance. Learning takes place in social practices. It then implies a sociocultural context where activity and development of the skill is being held. This means that, in IES, there cannot exist offers of "skills packages" that can be observed or described, nor be taught, but each one of them is developed by performance in the whole training process, with the inherent characteristics of each institution and its surroundings.

In this sense, competence supposes a combination of three elements: a) information, b) skill development, and c) the application in an unknown situation, for which is needed: 1) *knowing what* (developing the skill that allow social interaction); 2) *knowing how* (establishing links with social, cultural, political, economic environments, depending on the case); and 3) *being capable* (applying for several situations the knowing what and how).

In the Science in Education Program of UAEH, the development of several skills is promoted: generic ones oriented to personal and training development and citizenship exercise; and specific ones related with the professional field and the graduation profile. Generic skills (communication, training, judgmental thinking, creativity, and collaborative leadership) are those that a professional must have to successfully perform his/her work activities. To achieve them, the internal coherence of the program is essential to assure a real performance in different professional fields and contexts.

Specific skills (academic management, training in the field of education sciences, academic research, teaching practice for diversity and intercultural exercise) are defined as specialized knowledge to realize specific activities of a profession or discipline. They are developed in a certain context to apply knowledge to problem solutions related with professional field situations, in accordance with rules that are recognized by national and international certifying institutions.

In theory, this proposal represents a variety of professional training possibilities that imply, on one hand, the taking care of social requests for training and citizen competencies (individual characteristics and qualities), and therefore, the development of skills and abilities in the field of education sciences to assist and resolve socio-education issues.

An essential component about professional skills development is assessment that according to Nieto & Diaz-Villa (2008), allows the identification of competence and the level of performance by an individual, in relation to applicability, relevance, and organization of the specific activities of the specific professional field. It is necessary to consider that it is about a training process where we can only evaluate skills development from observation of performance, not merely as an evaluation of what has been taught. In light of the above in order to accomplish flexible training,

academic institutions will have to modify or restructure their organization and practices. They will need the application of alternative academic and curriculum organization which involves generating new ways of teaching.

Conclusions

According to the discussion above we have to recognize that curriculum flexibility and opening possibilities to assist diversity will make curriculum suitability possible, so undergraduate education may respond to people's requests. In addition, a flexible curriculum makes it possible for people to add essential content which will allow them to compete more equally, in an open way, in job markets.

Such innovations will allow the generation of alternative curricula that will have a more diverse response to the needs of the professional field in a globalized world.

Generic skills offer students equal conditions in their training, trying to reinforce national identity, as well as having the necessary skills to exercise citizenship with and in their community, enhancing local production.

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EDUCATION AS AN ENVIRONMENTAL TOOL

Abstract

One of the main factors in the globalization of problems and opportunities that face human society is science, which deals with matters of health, environment, competitive production, and employment, among other issues, and generally ways for promoting a better quality of life.

Science has become a central part of the culture in the developed countries, where it has been made a priority in the education of citizens. Also, traditional elements of culture have been reinforced when they emphasize and maintain development and a form of democratic life like supportive pillars.

Introduction

The need to address environmental problems requires a perspective that involves a critique of these different areas of knowledge and the development of human knowledge to create alternatives. For that reason, in addition to the influence of economic obstacles and social facts on the sort of development that can be used to deal with environmental problems, the chances of reversing the deterioration of the environment is compounded by the processes of education and the construction of knowledge (Romero, 1997).

Research will make it possible to identify the extent to which the environmental dimension is currently involved in the educational endeavour, as well as the obstacles that may face new educational practices, which range from looking at everyday life in the classroom, to the establishment of programmes of environmental education, mainly in terms of their social impact (Romero, 1997).

Educational philosophy

Educational philosophy is based on Article 3 of the Political Constitution of the United States of Mexico, in which it lays down that:

State education will stimulate and develop all the faculties of the human being in a harmonious way, at the same time as promoting patriotism in the context of international solidarity, independence and justice.

Article 24 guarantees freedom of belief, and education is to be secular and will maintain the absolute right of any citizen to hold any religious beliefs at all; education will be guided by the results of scientific progress, and will fight against the ignorance and its effects, servitude, fanaticism and prejudices.

In addition:

a) It will be democratic, considering democracy not only as a legal structure and a political regime, but as a system of life founded on constant economic, social and cultural improvement of the people;

b) It will be national, in so far as - without hostility or exclusion - it will take care of the understanding of our problems, the benefit of our resources, the

defence of our political independence, securing our economic independence and the continuity and increase of our culture; and

c) It will contribute to the improvement of human existence, as much by the elements that contribute to strengthening education, as with concern for the dignity of the person and the integrity of the family, the pursuit of the general good of society, and taking care to promote the ideals of brotherhood and equality of the rights of all men and women, and removing privilege on the basis of race, religion, social group, gender or individual differences (Political Constitution of the United States of Mexico, relevant text).

There can be no doubt that each civilization has incorporated technical and scientific knowledge into its culture. Philosophy analyses the relationships between education and the generation, diffusion, transference and application of scientific and technological knowledge, to improve the quality of life and social well-being.

In the report to the UNESCO International Commission on Education for the 21st Century, it is stated that: "Faced with the many challenges of the future, education is an indispensable tool for humanity to progress towards the ideals of peace, freedom and social justice" (Delors, 1996).

The same report also argued that lifelong education should be based on four pillars:

- Learning to know, combining a broad general culture with the possibility of deepening the knowledge in a small number of areas. This presupposes the ability to learn to learn, to be able to take advantage of the opportunities education offers throughout life.
- Learning to do, in order to acquire not only a professional qualification but, more generally, a competence that the enables an individual to act in a range of settings and to work in a team.
- Learning to live together, developing an understanding of others and of different forms of interdependence, while respecting the values of diversity, mutual understanding and peace.
- Learning to be, cultivating one's personality and character so as to be able to work autonomously, fairly and with a sense of personal responsibility, without diminishing the development of anybody's talents. This includes the development of memory, reason, aesthetic sense, physical ability, and competence, skills and attitudes to promote communication, and among other things:
  o The knowledge of how to generate and apply scientific, humanistic and technological knowledge,
  o The ability to acquire professional skills and attitudes,
  o The will to promote values, and
  o The originality to develop creativity.

Models of science and of education

The contributions made by paradigms in the development of science have been appropriate for the historical time in which they bloomed, and they function as an approach or theory that orients the way a subject is thought about and considered. This is an aid to people, who can believe, think about and organize their

understanding of reality. Scientific paradigms have given rise to the construction of the pedagogical models that inform education:

- Behaviourist theory: The behaviourism of Skinner consists of a passive response on the part of the student, like a machine processing data.
- Theory of the cognitive learning: For Piaget, who worked within the psycho-genetic tradition, learning has its origin in action, base on previous learning and mental organization. Learning must be significant for the student.

  Ausubel affirms that the significant learning for the student should arouse interest, motivation, innovation and application for that which is to be learned. Learning by discovery is one means of achieving these goals.
- Social learning theory: Vygotsky sees the student as a cultural being, while the environment has a great influence. The higher mental functions are acquired through social interaction.

No educational model is good nor bad in its own right, but all are perfectible, subject to adjustments, following their surroundings, and the characteristics of the students to whom it is applied, providing methods and resources for the teacher (Galindez, 2009).

The didactic foundation of research

It is said that research is the handling of things, concepts or symbols that allow us to extend, to correct or to verify the knowledge, or to help in the construction of a theory or the practice of an art (Slesinger, 1962). It is also said that to research is, "to run errands to discover something" or to conduct intellectual and experimental activities in a systematic way in order to increase knowledge on a certain matter (Dictionary of the Spanish Royal Academy, 2001). A third source mentions research as a process that is conceived as a continuous investigation and as a contribution to explanations that form the construction of knowledge, subjects and environments (Romero, 1997).

In this way research can fulfil one of two fundamental purposes: to produce knowledge and theories (basic research) or to solve practical problems (applied research). Thus, research is a tool that allows us to know our surroundings and its character is universal (Hernandez, 1999).

In addition, using research as a process for the social construction of knowledge, promotes the handling of information from different sources and the development of suitable media to support the communication of data, results, refutations and so on, and thus harnesses the flow of information (Cañal, 1987).

Titone (1981) says that research constitutes the most authentic and natural form of experience for any human being, the most natural and spontaneous route followed by human development generally, and the basis of all effective learning, including that of the student.

On the other hand, Bunge (1983) defines research as a directed process to find problems, to formulate them and to solve them. This process becomes scientific research when it is conducted with the methodology and the objectives of science. Thus, problems will be considered scientific when they take into account a scientific background and use scientific methods, with the primary objective to increase knowledge.

The didactic methodology is based on research, although it does not need to be adapted to strict scientific method, or the habitual work forms of scientists. A didactic model based on research should move forward on a number of equally important levels:

- Toward the development of the general aims of education;
- Toward the development of a scientific spirit, and the mastery of the intellectual operations suited to the scientific method, like a tool that can be applied to structure all forms of knowledge in a progressive way, both inside and outside the context of the classroom and laboratory;
- Toward a drive for unfolding experience, in accordance with the previous principles, and providing for the continuous development of the most natural methods of learning, at the same time as using them as tools of intellectual development.

Research can be accepted without hesitation as a sufficiently solid base to sustain an alternative curricular approach, which acts as a global didactic option that can characterize and organize the scholastic practice coherently (García, 1995).

Research methods

Research methods are a curricular element of singular interest and didactic utility and address many of the questions that need to be solved. In fact, they are essential to making an appropriate universal construction of knowledge possible, to stimulate the processes of research into means, to structure scholastic knowledge and to secure a correct integration of cross-curricular knowledge (García, 1995).

By making it possible to consider the social and natural world from a systemic perspective (Cañal, 2003), they define the range of things that can be researched as subsystems of the means specially selected to generate valid lines of scholastic research, such as the structure of the organization and the integration of scholastic knowledge.

Therefore, the scope of research is used as a high level curricular organizer, capable of suggesting how to organize the development of multiple didactic units throughout a stage of education. For example, the scope of investigation of "the home" could be made up of elements of:

- The characteristic elements of all types that make up the home as a system (family, way of life, other people, domestic equipment, furniture, etcetera);
- The interpersonal relationships (affective, of power, communication, etcetera);
- The relationships of the people who live in the home in a domestic environment;
- The distribution of domestic space and activities;
- The flow of materials and energy in the house; and
- The domestic arrangements (relationships, conflicts, economy, consumption, etcetera).

This list of problems, without doubt, can set in motion the content of many appropriate didactic units suitable for different levels in terms of perceptions, reasoning and complexity. In addition, the different types of research not only provide direction for the selection of problems for different didactic units, but they

are an important help in understanding and organising the general knowledge acquired, and connecting the latter to the personal and specific knowledge of the learner, providing criteria, knowledge and instruments for the construction of new schemes of knowledge, that are broader and more systematically structured (Cañal, 2003).

Educational research as an environmental influence

To address environmental problems, requires a perspective that involves various critiques of knowledge, and involves levels of development of human knowledge, with a search for and/or creation of alternatives or solutions. For this reason, the construction of the environment, understood as the interaction between nature and society, needs a new vision that considers reality as a whole. That is to say, it joins the natural and the social processes and studies the interrelationships between them.

In this context, conjectures and tests should form a complete project for environmental research which is designed to build up a critical analysis of the concrete forms of relationships between society and nature, and of human education, as a strategy of cultural and paradigmatic change, in the search for an integral explanation of the world (Romero, 1997).

How can educational research be conducted and applied in practice?

First of all, it is important to undertake the study of environmental education from a systemic perspective. It needs to be remembered that planning for education on the environmentembraces several fields: urban conservation, fairness, contamination, rural environments, environmental human rights, ecology, science, integral education, demographics, energy, poverty, ethics, alternative development, society, technology, quality of life, and so on. In addition, these fields interlink and overlap. The process should make explicit the relationships, interactions, results and consequences of interest, and communicate them widely (Mrazec, 1996).

Secondly, the following should be considered as guidelines for achieving good results from research projects in environmental education:

a. The results of the research are useful insofar as they meet the educational needs of students. This implies that we, as researchers, must include/understand the environmental problems and the need to solve them, involving students in this process.

b. The success in the transmission of the results of research depends, for the student, on how it is communicated and the degree to which it is memorable. We cannot hope that our students will understand a badly designed message (Monroe, 1996).

Also, to be able put the results into practice, it is important to remember that research, in any field, starts from ideas. Thus, ideas to conduct research in environmental education can arise at any time and in any place: in the school, when observing the relationships in a neighbouring group, in a park, the construction of an engineer construction, when washing our hands, when throwing out the rubbish, when watching the television or listening to the radio.

Certainly, the majority of initial ideas are vague and require careful analysis so that they are transformed into more precise and structured expositions, through

knowledge of studies and similar and/or previous research. In this way the research idea will be formally structured (Hernandez, 1999).

Continuing with the exposition of the research problem is nothing other than more formally sharpening and structuring the research idea. The elements that need to be considered in posing a problem are:

- The objectives, that is to say, what it to be attempted in the research;
- The research questions, from which the development of the project will be guided. To put it another way, they are the questions to which the project is a response;
- The justification for the study, in which the reasons for the study, and its importance, are explained (Hernandez 1999).

The theoretical framework is developed through stages. In this process the study is sustained theoretically. This implies a literature survey of the topic, to analyze and to set out the theoretical approaches, the previous research and the background that are considered important to frame the study (Rojas, 1981). The theoretical framework, among other things, makes it possible to avoid errors that have been committed in similar studies, to orient the way to conduct the study, and to provide a frame of reference to interpret the results of the study.

It will also define the type of research that must be conducted, that is to say, the way to carry out the project. Some of the most traditional ways of conducting research projects are:

a. Exploratory study: Where the objective that is pursued is to examine a subject or problem of investigation that has not been studied much or has not been approached.

b. Descriptive study: Where one seeks to specify the important properties of people, groups, communities or any other phenomena that are analysed. It measures or it evaluates different aspects, dimensions or components of the phenomenon being investigated (Dankhe, 1989).

c. Correlation study: Where two or more variables are measured to see if they are related or not. If there is a correlation, its exact form is analysed. The usefulness of this is that it is possible to know how a variable will behave when the behaviour of other variables is known.

d. Explanatory study: It is directed to explaining the causes of physical or social events. Its interest focuses on explaining why a phenomenon takes place, and in what conditions it occurs, or why two or more variables are related (Hernandez, 1999).

According to the type of investigation selected, it will be possible to identify the methods to use. If these are quantitative and objective, all very well. If they are more subjective and qualitative, even better! The only important thing is that criteria should be applied responsibly (Marcinkowski, 1996).

Finally, once the research process is finished, an analysis of the results obtained and an exposition of the conclusions that the research allows us to arrive at will have to be prepared.

Conclusions

Educational policy must be a permanent process to enrich knowledge, orient technical capability toward a structure that privileges individuals and relationships

among them, between groups and in the same way between nations. In this way such policies contribute to a better world, to a viable development, to a mutual understanding between peoples and to a renewal of democracy.

Also, from this perspective, it is advisable to emphasis the ethical, logical, aesthetic and cultural aspects of education, as a means by which a society transforms information into knowledge. Education must be at the service of human, economic and social development. It must reconstruct boundaries and spaces so as to achieve the concept of lifelong education.

In conclusion, it be said that local sustainability generates processes of participation, that generate a new management of natural resources, where environmental education is the work tool that makes possible new visions of the future and the design of strategies for action on the environmental problems felt by the community.

The task now is to generate not only the indicators of local sustainability, which are already being developed in many countries, but also the strategies of communitarian implementation, so that they are a real tool of sustainable and friendly management of the environment.

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Part 4

Higher Education, Lifelong Learning & Social Inclusion

JAMES OGUNLEYE, CHRIS GRIFFITHS & PETER RYAN

STUDENTS' AND TEACHERS' PERCEPTIONS OF A 'SUCCESSFUL' LIFELONG LEARNING TRAINING INTERVENTION – AN EMILIA PROJECT RESEARCH REPORT

Abstract

This study reviews the definition of lifelong learning in the context of the European Union policy agenda as sets out in the Lisbon strategy. The paper also reports on the mental health service users' and trainers' perceptions of a 'successful' lifelong learning training intervention. The work reported in this paper was part of a larger study which examines EMILIA lifelong learning training in one EMILIA demonstration site. The study interviewed a number of mental health service user-trainees and service user-trainers using focused group in order to get a deeper understanding of the experience and results – 'success' or otherwise – of EMILIA training model as applied to adults with long-term mental illness. Analysis was based on an interpretative technique – specifically recursive abstraction – of the interviews. The results show that students (trainees) perceived the training intervention as successful because of students were involved in setting the 'ground rules', prefer and enjoy varied teaching methods, had the opportunity to network socially and, more importantly, realised that by participating they could achieve and succeed on the course. The review part of the study suggests that, although the European Union, as indeed most member states, predicates lifelong learning policy on mainly economic factors – i.e. economic growth and jobs – tackling exclusion or promoting social inclusion remains a central plank of strategies for lifelong learning at both national and European levels.

Context of study: the EMILIA Project

EMILIA stands for 'Empowerment of mental illness service users: lifelong learning, integration and empowerment'; it was a framework 6 research and intervention project, funded at €3.4 million over a four and a half year period, from September 2005 to February 2010. The EMILIA project was one of a number of European development programmes funded by the European Union, part of a wider effort to address the problem of exclusion of multiple disadvantaged groups such as unemployed people with long-term mental illness. EMILIA was the European Union's largest ever funded research and intervention project on lifelong learning

and mental health/social inclusion. The project had 16 partners in 13 European countries; two of these countries – Norway and Bosnia and Herzegovina – are outside the European Union region. A major goal of the EMILIA project was to explore the use of lifelong learning, through EMILIA intervention activity or lifelong learning training, as a means of achieving improved social inclusion of people with long-term mental health illness. The EMILIA training programmes were ran across eight demonstration sites in eight European countries – namely the United Kingdom, France, Norway, Greece, Spain, Poland, Bosnia and Herzegovina and Denmark. The project's ultimate goal was to achieve the integration of European policy in the areas of lifelong learning, social inclusion, employment, and information technology as applied to mental health. The work reported in the following paragraphs relates to an aspect of the EMILIA project research carried out at the UK demonstration site.

European Union's conception of lifelong learning

> Lifelong learning is considered as an important part of the European Union Lisbon strategy according to which the European Union should become by 2010, the most competitive and dynamic knowledge-based economic area in the world, as well as a more cohesive and inclusive society. Acquiring and continuously updating and upgrading skills and competences is considered a prerequisite for the personal development of all citizens and for participation in all aspects of society (Eurostat, 2009).

The above quote is taken from the *2009 Adult Education Survey* recently published for the European Commission by the Eurostat. It underlines the timelessness and 'evergreen nature' of the lifelong learning agenda especially since the European Union's proclamation of 1996 the European Year of Lifelong Learning (see also Ogunleye, 2007). Lifelong learning has many definitions – depending on the contexts in which it is defined or, in some cases, the concept/s that is used to explain it. However, in its simplest form, lifelong learning can be defined as all learning activity undertaken throughout life. The emphasis in this definition is *learning* which can be undertaken for personal/leisure reasons or professional/employment reasons, or both. This *learning* can take different forms and can take place in varied range of settings or contexts – be it formal, informal and non-formal settings. The European Union's definition of lifelong learning is purposely broad but no less definitive. According to the European Commission policy document *Making the European Area of Lifelong Learning a Reality* (Com, 2001), lifelong learning is defined as:

> ... all learning activity undertaken throughout life, with the aim of improving knowledge, skills and competences, within a personal, civic, social and/or employment-related perspective.

The Commission's definition intensely focused on the Lisbon policy strategy which was meant to highlight priority action areas for national governments in the Member States of the European Union. Although the linchpins of the European Commission's definition of lifelong learning are economic growth and jobs – including knowledge and skills development and competences – there is, equally, a

genuine underlying focus on social dimension of the Lisbon strategy. The elements of this social dimension include community cohesion and integration, citizenship, and cultural renewal. These elements are often referred to by their collective term of *social inclusion*. The European Commission (Com, 2003) relates social inclusion approach to education and training as follows:

> a social-inclusion approach [to education and training] which mainly targets those whose initial experience of education and training has been unsatisfactory or inadequate, certainly in relation to the modern world, and which seeks to re-engage them with a learning experience which may, especially at the initial stages, focus on personal development and bringing them up to a level of personal and basic skills which ... (Com, 2003).

Social inclusion has become wedded to the European social policy agenda, an agenda that places an emphasis on tackling exclusion especially of people from multiple disadvantaged groups including those experiencing severe long-term mental illness. Lifelong learning is considered not only a tool for achieving the Europe's vision for a high-skills, knowledge economy, but it is also, at the same time, considered a tool for achieving the social inclusion of people from the disadvantaged groups. It is this dual-role that makes lifelong learning the bedrock of the Lisbon policy agenda.

According to Holford's (2008a; 2008b) extensive review of lifelong learning policy documents produced by the European Commission over the years, alongside the economic reasons for lifelong learning i.e. growth and jobs, social inclusion remains a significant policy focus. In other words, despite a noticeable 'shift' in the definition of lifelong learning over the years (see also Holford, 2009), the importance of lifelong learning as key to tackling social exclusion and fostering social and community cohesion continues to be amplified at the European level: the most recent example being the European Council agreement on the strategic framework for European cooperation in education and training or the so-called *Education Training 2020* (see Com, 2009).

The strategic framework for European cooperation in education and training has four strategic objectives. Two of these objectives were to: 'Making lifelong learning and mobility a reality' and 'Promoting equity, social cohesion and active citizenship'. The broad emphasis of the European Union on the promotion of equity, social cohesion and active citizenship at all levels in body politic, in Member States, has the ultimate goal of strengthening Europe's social policy agenda – so as to advance the European social model. This twin policy objective is rooted both in the Lisbon Strategy (Com, 2000) and the Sustainable Development Strategy (Com, 2005a). It is noteworthy, also, that in the current round of the European Commission Social Policy Agenda (2005-2010) (Com, 2005b), two strategic objectives were identified from which priority is being given – these are 'employment', which falls under solidarity objective, and 'equal opportunities and inclusion', which is situated also in the solidarity objective. Every Member State of the European Union is expected to operationalise this twin social policy agenda at national level. As the European Commission's White Paper entitled *Growth, Competitiveness, and Employment* (Com, 1994) explicitly states:

Lifelong learning is, therefore, the overall objective to which the national educational communities can make their own contributions.

The White Paper adds that:

All measures must, therefore, necessarily be based on the concept of developing, generalising and systemising lifelong learning and continuing training. This means that education and training systems must be reworked in order to take account of the need... for the permanent recomposition and redevelopment of knowledge and know-how.

The alignment of Member States' national strategies for lifelong learning should, therefore, be seen in the context of the 1994 White Paper on *Growth, Competitiveness, and Employment.*

The alignment of Member States' national strategies for lifelong learning with the European Union's lifelong learning policy has been well documented (see, for example: Holford, 2008a, 2008b, 2009; Stenfors-Hayes, et al., 2008; Ogunleye, 2007, 2009a, 2009b, 2010). The aligning of lifelong learning policies at both national and European level notwithstanding, there are national differences in policies, practice and guidelines which are attributable to differences in learning culture/tradition and in the constructions of the meaning of lifelong learning. According to a study for the European Commission (Com, 2003), differences are also attributable to:

issues like the degree of development of adult education systems, integration of education and vocational training or the degree of centralisation or decentralisation of systems.

Methodology

The results presented in this study were part of a much larger and detailed study and the space and word limit will not allowed the authors to set out the details of the methodological approach in the paper. However, data was collected via focus group interview as well as content analysis of relevant European Union policy documents on lifelong learning and policy documents of selected member states. All the interviewees were based at the Middlesex University demonstration site, one of the eight EMILIA demonstration sites.

Results

The following paragraphs highlight what students and teachers in the study perceived as 'success' factors in EMILIA's lifelong learning training intervention:

Establishment of ground rules

The participants in the research considered a decision by EMILIA teachers to allow them to set their own ground rules as perhaps the most success factor in the lifelong learning training:

We went on too long in the first session before we had a break so we then established some ground rules about group operation and behaviour. A rule we would have liked to have introduced, but did not, concerned punctuality

as students wandered in up to half an hour late and this delayed the start of the session.

Safety of self and others
The teachers considered the risks for the students and their safety and they tried to identify available sources of support for the students.

Flexibility of programme and adaptable learning materials
The teachers adapted the programme to suit the needs of the students:

> We were a little shocked at the way members of the group talked about themselves, using it as a support group. To provide a safety net, we spent the beginning of the second session discussing in small groups the student's sources of support within and outside the course.

> A lesson plan goes out of the window. You have to learn to be flexible. You have got to be thinking of people as individuals and working with them rather than as a class and getting from A to B.

> The group was very different. People were at different stages of recovery. They had different intellectual capabilities. They had different expectations. They were more or less prepared to take risks and give of themselves... I think the challenge for me was encouraging a constructive response from such a mixed audience.

The teachers identified the level that the students were at and changed the material and structure to suit students' needs:

> The second major problem we had was that the material, as well as being too much, was focussed on developing leaders and the students were not ready for this. The knowledge assumed about service user issues, it became apparent in the first session, was beyond the group and they were certainly not in a position to assess leadership skills. We therefore modified the second session to focus on their needs from mental health services and how they would frame that as a general requirement which others would support. We followed this up with a mapping exercise of local services and user involvement in those services although even this was beyond the scope of several of the group. Fortunately, we had already modified the group exercise to concentrate on skills needed in the local service user group rather than leadership skills in general and we omitted the identification of core leadership skills and the issue of a leadership challenge.

The teachers helped students to identify relevant existing knowledge:

> The group exercise we developed for the second session was well received and helped the students realise that they knew more than they thought they did.

The teachers enabled students to use their personal experience in a structured formal way:

> We set up the final session in a more formal way and everybody made a short presentation about how they thought mental health services could be improved based on their own personal experience.

Session sought to enable students to identify their own needs/modify the format of lesson to engender student confidence:

> The modification of the session making the emphasis on identifying their own and local needs enabled them to develop their advocacy skills. This bore fruit in the final two sessions when the students each made a five minute presentation. We made the focus of this advocacy from personal experience rather than public speaking to a large audience and the students were very enthusiastic about having a go at a presentation although we had been prepared to modify the format if individuals lacked confidence.

Teachers were sensitive to the different abilities and speed of progress of the students and provided extra support where needed:

> Some people could go really quickly and others we had to help to work things out.

The use of varied/mixed teaching tools and approaches

> ... brainstorming, discussions in pairs, small and large group discussions; personal note taking as well as drawing pictures to encapsulate our thoughts e.g., on the recovery process.

> ... in the main the group were willing and able to explore issues using different mechanisms/tools. We worked as a large group, small groups, in pairs and individually. We used innovative charts, diagrams and tools to enhance the learning experience.

Shared group knowledge/team spirit

> There was something to learn from everybody [in the teaching group]. Everyday experiences can be developmental and significant.

> It was about working together effectively as teachers in the classroom.

> The students stretched our facilitation skills. You had to be very strongly interventionalist to give everyone a chance to speak, to try to give the quieter ones a voice.

> There was a wide spectrum between introverts and extroverts, but the former became more vocal and the latter became better listeners. This was part of the group spirit, which was evident at the start but continued to grow. There was also a disparity between the educational achievements within the group. But this did not cause a division, with the views and experiences of the entire group being respected.

Challenging sessions

> In the last class we did an exercise on the improvement of self-image the majority of students felt this was too ambitious. In retrospect I agree. While

we should not underestimate the intellectual capabilities of the students we must not underestimate years of low self-image and stigma.

Social networking/social/people skills
New friendships were created; confidence grew as people became self-aware.

Students expressed enjoyment at the lack of pressure, the experimental nature of the work, working together and feeding on each other's thoughts and ideas.

In session three, we focused on public speaking, talking about the value of speaking from personal experience and how to do it safely then allowing students an hour to prepare a five minute presentation which they would present at the final session.

Social inclusion and social support within the group was a key part of the training's success and friendships went beyond the classroom:

People started working together. Friendships have been built out of the course. One of the most difficult things is to break the isolation that comes with mental health problems.

Reduced isolation and increased human connection with each other were expressed as being an important part of the training:

There was a feeling of not being alone; although people's experiences were totally different the sentiments that were being expressed were quite similar in terms of frustration, in terms of perceived isolation, and I felt sane, and I thought, oh, I'm not the only one. Which is quite something.

Self belief, esteem, hope, recovery
There is a realisation by the participating students that they could achieve and succeed on the course:

It was quite a shock to see people who live under the category, perceived or otherwise, of mental health [service users] actually achieve things that other people have done…it seems quite implausible to them to start with, but then it hits home to them that no one else did it, so, by default, it had to be them.

People were beginning to be able to believe in themselves and beginning to believe in the strengths that they had identified.

"It has transformed my perception of what education can be about and what teaching can be about. It can be a genuine process of discovery and learning in a much more organic way. It was a much more authentic [learning] experience than I had previously found. It has changed my perception of how I need to be myself in order to be a good teacher."

Conclusions remarks

It is clear from the foregoing interviews that for the students (trainees) perceived the training intervention as successful because of students were involved in setting the 'ground rules', prefer and enjoy varied teaching methods, had the opportunity to

network socially and, more importantly, realised that by participating they could achieve and succeed on the course.

Similarly, from the review of literature, social inclusion and empowerment of people from particularly disadvantaged groups such as those recovering from severe mental illness and mental health service users in general remain a priority in the European social policy agenda. There is a justifiable choice of lifelong learning as a means for achieving the social inclusion at both national and European level. At the policy level, every European country has a legal framework for lifelong learning, which accords broadly with the Lisbon agenda of the European Union. However, there are differences between countries in the implementation of lifelong learning policy – differences that have a lot to do with the individual country's lifelong learning tradition/culture, resources, etc and also to do with the constructions of the meaning of lifelong learning. These differences are not unexpected as Member States were under obligation to implement the Lisbon policy agenda by taken into account their country's particular characteristics which may include culture and tradition of lifelong learning, and the availability, or absence of resources. All in all, across Europe, there is a common – perhaps shared universal – acknowledgement that lifelong learning is a useful tool for addressing the particular needs of mental health service users, a particularly disadvantaged group.

Acknowledgements

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LIVING WITH ANXIETY DISORDERS – UNEMPLOYMENT AS A BARRIER TO SOCIAL INCLUSION

Abstract

Individuals living with anxiety disorders often face significant obstacles in their day to day lives. While trying to manage the physical and emotional symptoms associated with these disorders can be a challenge, sufferers also encounter barriers by way of social exclusion from key life domains: family life, relationships, education, employment and community and civic engagement. One of these life domains – employment has the ability to promote social inclusion and social connectedness and can improve health and wellbeing. It is observed that individuals living with mental health disorders are overrepresented in the unemployment population. This paper addresses the challenges anxiety disorder sufferers encounter, the way unemployment acts as a barrier to social inclusion and strategies to promote social inclusion through employment for individuals living with anxiety disorders.

Introduction

> *We live in the state and in society; we belong to a social circle which jostles against its members and is jostled by them; we feel the social pressure from all sides and we react against it with all our might; we experience a restraint to our free activities and we struggle to remove it; we require the services of other [people] which we cannot do without; we pursue our own interests and struggle for the interests of other social groups, which are also our interests. In short, we move in a world which we do not control, but which controls us, which is not directed toward us and adapted to us, but toward which we must direct and adapt ourselves.*
>
> Gumplowicz, 1963, p. 6

Anxiety – medical approach

Anxiety has been noted to be the most common mental health disorder (Medical Disability Guidelines, 2009), with middle aged people being at the highest risk. With regard to a more general definition of anxiety, 16% of the general population suffer from some form of pathological anxiety, with a lifetime prevalence of 28% (Medical Disability Guidelines, 2009). According to the Australian Bureau of Statistics (ABS) National Survey of Mental Health and Wellbeing (2007), anxiety disorders are the most prevalent mental health problems in Australia with 14.4% of Australians reporting symptoms consistent with this diagnosis, during the 12 months prior to the survey. The prevalence rate is higher in females (18%) compared to the rate in males (11%); women are more likely to seek specialist's help.

Anxiety refers to the state in which an individual is inordinately apprehensive, tense and uneasy about the prospect of something terrible happening (Halgin & Whitbourne, 2008). It typically causes a combination of physical and psychological symptoms. Physical symptoms include: headaches, dizziness, flushing, dry mouth,

problems with swallowing, breathlessness, tachycardia, nausea, diarrhoea, urinary frequency, trembling, cold clammy hands, sweating, muscle tension, restlessness and fatigue. Psychological symptoms include: feelings of threat, distraction, difficulty in concentrating, feeling tense, irritability, labile mood, noise intolerance, early insomnia, nightmares, panic attacks, perceptual distortion and depersonalisation (dream-like sensation of unreality). In the ICD-10 Classification of Mental and Behavioural Disorders anxiety disorders are classified as phobic anxiety disorders (F40) and other panic disorders (F41). Post Traumatic Stress Disorders (PTSD) are categorized as a reaction to severe stress – adjustment disorders (F43.1), however often high level of anxiety is observed (http://www.who.int/classifications/icd/en/GRNBOOK.pdf).

Anxiety as an emotion (fear, nervousness or vigilance) is essential to the human experience and serves as a natural and necessary response mechanism in times of crisis or danger. Anxiety disorders are associated with high impairment as defined by poor self-perceived health and low quality of life (Wittchen et al., 2000), interfering with day to day functioning (Meadows, Singh & Grigg, 2011).

Treatment for anxiety disorders includes psychotherapy and pharmacotherapy. These interventions can be done singly or in combination. Although treatment for anxiety disorders through pharmacotherapy plays an important role in lessening the burden of symptoms, the power of social and environmental factors in managing mental disorders is underestimated (Nikelly, 2001).

Employment

From a social perspective, employment serves many important functions within most societies (Noble, 1998): it provides an essential source of income – when adequate, allows individuals to meet their basic needs, offers them choices in the selection of goods and services, and promotes independence. Employment also plays an important role in determining social class and social standing, being a means through which people develop social relationships. From an individual perspective (Linhorst, 2006) employment status promotes a subjective sense of empowerment and integration into the community and provides a means to which individuals can obtain independence, shape self-esteem and form their identity. Knisley, Hyde and Jackson (2003) stated: *In our society we define ourselves as well as others by what we do – our work. Work is an essential element of our participation and acceptance in our communities* (p. 140). Consequently, employment, or lack of it, has implications not only on how others view us but also on how we view ourselves.

Unemployment and mental health

The social psychology literature (Feather, 1990) distinguishes between three, interrelated mechanisms by which unemployment may have negative emotional consequences, the first of which is the loss of self-esteem. Although self-esteem is generally considered to be fairly stable over an individual's life cycle (and mainly shaped during childhood), major life changes may alter it – unemployment is such an event, remembered by many persons as a very stressful and unpleasant experience. The second mechanism is the feeling that as a consequence of being

without a job, life is not under one's control. The feeling of helplessness and hopelessness caused by the fact that employment prospects seem to be independent of one's efforts to obtain a job is experienced as depressive by many who are unemployed. A third mechanism, emphasized by Jahoda (1982), is the loss of several aspects of working life, such as the time structure of the working day or working week, the contacts with people outside home, workplace social network and the status and identity associated with having a job. Deprivation of these life functions can be psychologically harmful for many persons.

The lack of participation in the workforce can not only restrict social connectedness with others but also limit the opportunities to contribute to completing shared tasks, and developing self-efficacy (Himle et al., 2014). In this context, for individuals living with mental disorders, compared to the general population, the detriments of unemployment are often deeper and more critical since sufferers are often defined by their diagnosis instead of their qualifications, skills and value, making them feel stigmatized and marginalized. In a vicious cycle, their condition deteriorates. Moreover, exclusion from the workforce coupled with isolation from society are factors that can often lead to chronicity (Warner, 1985 in Nikelly, 2001).

Linhorst (2006, p. 206) outlines several key conditions for empowering people diagnosed with mental health problems through employment. These are:

- *psychiatric symptoms management: they should be managed to the degree necessary to participate in a specific job at a specific time;*
- *participation skills: the person should possess the skills required to participate in a particular job;*
- *psychological readiness: the person has the confidence, motivation, and willingness to seek employment and maintain a particular job;*
- *reciprocal concrete incentives: concrete incentives exist for the person suffering mental disorders to obtain and maintain employment and for employers to hire and retain people with such a condition;*
- *availability of choices: the person has choices of jobs that are meaningful to him or her;*
- *participation structures and processes: the person has structures and processes through which he or she can obtain and maintain employment;*
- *access to resources: the person has access to the resources needed to obtain and maintain employment;*
- *supportive culture: work setting and mental health organization from which the person receives supportive services in regards employment.*

Linhorst's recommendations are important in illustrating that professional assistance should be multidisciplinary – with mental health professionals, educators, social workers, employers and policy makers applying a collaborative approach.

Social inclusion

Social inclusion takes on a wide range of different meanings making it an often disputable term in various contexts (e.g. health, unemployment, homelessness), and degrees – in narrowest interpretation as access, in a broader one as participation, and as the widest as empowerment (Gidley et al., 2010, p. 2). The latter of these,

empowerment, focuses on nurturing human potential, claiming social transformation, cultural diversity, lifelong learning and is characterized not only by an individual being a present member of a society but by also having a meaningful place in it (Cobigo et al., 2012). Integration into the community, the opportunity to fulfil expected social roles and reciprocal emotional support are associated with a satisfying quality of life (Nikelly, 2001).

Living with anxiety disorders – unemployment as a barrier to social inclusion

At a population level, little is known about the degree of disability and employment restrictions experienced by persons with anxiety disorders. When diagnosed, sufferers often "quit" the public mental health systems, hence the nature and extent of employment restrictions among persons with anxiety disorders may be underestimated (Waghorn & Chant, 2005). In their study, Waghorn and Chant find that the proportion of persons with anxiety disorders not in the labour force (47.1%) was more than double that of healthy persons (19.9%). Once out of work, people were more prone to longer periods of unemployment than healthy persons. Among anxiety disorders sufferers 24.9% were out of work for 104 or more weeks and 55.2% for 26 weeks or less. Persons reported a need for special arrangements or equipment, 23.3% indicated a need for a support person. When participants were asked "Are you receiving any assistance from a disability job placement program or agency?" only 2.5% of job seekers confirmed this form of assistance. Waghorn and Chant (2005) concluded that anxiety disorders appeared both directly and indirectly associated with degraded career trajectories.

A subsequent report by the ABS National Survey of Mental Health and Wellbeing (2007) focusing on mental health in Australia found that people unemployed or not in the paid workforce have the highest rate of mental disorders, a prevalence rate of 26% for unemployed men and 34% for unemployed women.

Goldsmith and Diette (2012) state that short term unemployment does not significantly harm mental health, however, long term unemployment can be devastating. Unemployment is defined as being long term if the individual is unemployed for in excess of twelve months (ABS National Survey of Mental Health and Wellbeing, 2007). The longer an individual is out of the workforce, the more difficult it is to get back in. This phenomenon can be attributed to: a decrease in social or workplace networks, loss of relevant skills, decreased confidence and motivation and employers' negative perception of those who are unemployed.

Practical implication for rehabilitation services

Paid work in open employment settings is increasingly viewed as a strategy to help people recover from mental disorders i.e. to participate more fully in community life, improve their standard of living and reduce their dependence on income support. Vocational rehabilitation is structured around a set of holistic services to enable people to obtain and maintain employment. In supporting individuals with anxiety conditions enter or return to the workforce, their health considerations and work capacity should be at the forefront vocational rehabilitation. An inappropriate vocational plan can inadvertently exacerbate one's condition and

symptoms e.g. – an individual who has been unemployed for an extended period of time and who suffers from an anxiety disorder such as agoraphobia may not be well placed to work as a security officer where he or she is required to monitor open spaces, interact with customers and often manage difficult and unpredictable situations.

One of the suggested approaches is Supported Employment (SE) where clients are placed directly in integrated work settings at award wages and provided with training and support.

Some anxiety sufferers are not yet ready to return to the workforce. In such circumstances, pre-vocational structured and personalised interventions can be implemented in order to support the individual to increase their confidence, build their skills and improve coping strategies. Pre-vocational rehabilitation generally focuses on services and support that are required prior to engaging in job seeking and on interventions that aim to address psychosocial- spiritual development, career exploration and promote structured activities. These interventions can include: career counselling to determine potential vocational pathways, work experience or volunteering activities to build work capacity, the development of interpersonal skills and education or re-training (Center for Substance Abuse Treatment, 2000). Some pre-vocational interventions such as re-training can be conducted in a group, rather than one on one setting to enable participants to socialise, work together with other participants and mimic interactions that are commonly encountered in the workplace.

Finally, it should be asked, what can be done for individuals whose anxiety condition is so severe that it renders them unable to participate in paid employment. This is of particular concern with regard to military veterans, many of whom after reoccurring exposure to traumatic events in combat develop Post Traumatic Stress Disorder (PTSD) (Richardson, Freuh & Acierno, 2010) and find it difficult to transition into civilian life. For many of them, prognosis is often poor and any likelihood of obtaining work is unrealistic. For those who fit into that category, there are alternative options that can to some extent replicate the benefits of employment and promote civic engagement and the broader social inclusion. If we look at the importance of social inclusion as described by Verdonschot et al. (2009) employment is just one of the factors listed. Other factors are community and civic life including volunteering, hobbies, leisure activities and other forms of socialising.

Conclusion

The medical model's approach to assess and treat anxiety conditions is crucial. However, a greater level of emphasis is now being placed on the social environment as a catalyst for positive change and recovery among mental health sufferers. For individuals living with anxiety disorders, social exclusion from key life domains such as employment has often been a barrier to maintaining quality of life. With the right job fit and in applying practical strategies through rehabilitation services, suitable and sustainable employment can play a key role in supporting individuals with anxiety conditions to break down barriers associated with social exclusion, obtain a greater sense of connection to the community, increase self-esteem and improve health and wellbeing.

This overview sets the stage for further research aimed at uncovering how anxiety disorders undermine employment. Semi-structured interviews with job seekers would likely yield further insights into the relationship between anxiety disorders and employment difficulties, guiding both vocational service and mental health professionals to plan feasible and effective vocational rehabilitation programs. When implemented, further analyses are needed to determine ramifications on mental health clients, their families and carers.

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USING CONTACT AND EDUCATION AS A MEANS OF COMBATING THE STIGMA OF MENTAL ILLNESS: AN EXAMPLE OF A POLISH FOUNDATION „EF KROPKA"

Abstract

Social stigma is widely recognized as a major barrier to recovery from mental illness. In Poland, as in other countries, the society perceives mental illnesses as an intimidating problem, while the people affected are often treated with reservation and a sense of distance. One of the first Polish organizations addressing stigmatization and social exclusion of people with mental disorders was the "Open the doors" Association from Kraków. Now their work is followed in Warsaw by the Foundation eF point (*Fundacja eF kropka*). It is a non-governmental organization formed at the initiative of people professionally involved in helping persons with mental illness experience. The Foundation's attempt is to change the negative assumptions about the outcomes of mental diseases, convictions rooted in social awareness and patients' self-perception. This paper describes how the Foundation uses the education and contact approaches to reduce the stigma surrounding mental illness and to foster personal empowerment of people receiving psychiatric treatment. The details of its new anti-stigma initiative "Together against stereotypes" are provided.

Mental illness stigma – a barrier to recovery

People affected by mental illnesses bear a double burden: that of the psychopathological symptoms and deficiencies in social functioning and, sometimes even to a greater extent, of the social stigma and its behavioral consequence – discrimination. In this regard, stigma is often called "the second illness". It is believed that it is currently the most important challenge in mental healthcare and one of the main obstacles in the recovery process. Although numerous efforts have been undertaken globally to eradicate psychiatric stigma (Sartorius & Schulze, 2005), it continues to exert harmful effects on people with mental health problems, their families, treatment providers and whole communities (Corrigan, 2005a). In the USA, Wahl (1999) conducted a nation-wide survey among over 1300 people with mental illness about their experiences of stigma and discrimination, followed 100 of the survey respondents with interviews and found out that social rejection was a frequently reported phenomenon. Respondents said that others avoided them once their psychiatric disorder or mental health treatment was disclosed; friends stopped calling, neighbors' visits decreased and social invitations declined. People experienced an increased sense of isolation and alienation from their communities. In another large-scale study involving over 700 participants with schizophrenia, Thornicroft et al. (2009) found coherent stigma experiences across 27 countries. The most common areas of negative experienced discrimination were making and keeping friends, discrimination by relatives, keeping or finding a job and intimate or sexual relationships.

There is a consensus that widespread negative approach towards people with mental illness (i.e. public stigma) is only one aspect of the problem. No less important are the attitudes and reactions of the stigmatized themselves, who often accept and relate to themselves negative stereotypes of mental illness, which results in lower self-esteem, lack of faith in the efficacy of their own actions, the abandonment of efforts to achieve meaningful life goals, and reduced help-seeking (Corrigan, 2005a; Corrigan et al, 2009). This phenomenon is referred to as self-stigma or internalized stigma.

Stigma in the Polish context

Poland is one of the few countries where, over the past two decades, studies on opinions about and attitudes towards people affected by mental diseases were conducted every few years on representative samples of the population (Wciórka & Wciórka, 2000, 2006, 2008; Wciórka, 2012).This research consistently demonstrates that insufficient knowledge and rather stiff stereotypes (only to a slight degree dependent on age and gender of the respondents) influence considerably the attitudes towards people with mental illnesses. The society perceives mental illnesses as an intimidating problem, while the people affected are often treated with reservation and a sense of distance. Evidently, there is a tendency to exclude persons receiving psychiatric treatment from significant social life areas. It is reflected in the objection to their assuming the roles connected to responsibility and requiring trust (such as e.g. teacher or doctor). Meanwhile, a substantial part of the society believes that people suffering from mental diseases are discriminated against in our country, especially in terms of their right to employment, education, dignity, asset protection and fair trial.

Over recent years, studies documenting various aspects of stigmatization from the point of view of people receiving psychiatric care were also performed in Poland. In one study conducted in Warsaw on a sample of 153 people with schizophrenia it was found that a majority of respondents reported having concealed their illness for fear of rejection (86%), witnessed others saying offensive things about people with mental health problems (69%), worried about being viewed unfavorably by others (63%) and been treated as less competent (59%) (Świtaj et al, 2009). A similar study performed by Cechnicki, Angermeyer & Bielańska (2011) on a sample of 202 schizophrenia patients from the Małopolska region revealed that the majority of respondents anticipated discrimination in interpersonal contacts (58%) as well as in the area of employment (55%). The most common experiences of actual discrimination in interpersonal interactions were the feeling of rejection by other people (87%) and having had an interpersonal contact broken off (50%). Furthermore, almost one third (31%) of the participants had experienced discrimination in the area of employment. Other studies carried out in Poland showed how stigma and discrimination negatively affect personal and family life of people receiving psychiatric treatment (Świtaj et al, 2014a), reduce their sense of empowerment (Wciórka, Świtaj & Anczewska, 2014) as well as self-esteem and the willingness to seek social support (Świtaj et al, 2015), and contribute to elevated levels of depression (Świtaj et al, 2014b) and loneliness (Świtaj et al, 2014b, 2015). Thus, the evidence from this body of research clearly mirrors the results of public

opinion surveys and highlights the need for undertaking initiatives aiming to counteract the pernicious impact of mental health stigma and discrimination.

Changing societal attitudes towards people with mental illness

Researchers distinguish three main strategies for changing public stigma: education, contact, and protest (Corrigan, 2005a, 2005b). Educational approaches to stigma challenge inaccurate stereotypes about mental illnesses, replacing them with factual information, e.g. indicating that the difference in the rate of homicides by people with serious mental illness versus the general population is very small. Educational strategies include public service announcements, books, flyers, movies, videos, web pages, podcasts, virtual reality, and other audiovisual devices (Finkelstein, Lapshin & Wasserman, 2008; SAMHSA, 2011). The benefits of such interventions are their low cost and broad access. A second strategy for reducing stigma is personal contact with members of the stigmatized group. Members of the general population who meet and interact with people with mental illnesses will likely show lower levels of prejudice (Corrigan, 2005b). Socio-psychological research has identified factors that seem to moderate contact effects (Allport, 1954; Pettigrew & Tropp, 2000), including one-to-one contact so that people who engage with one another can learn of similar interests and potentially cultivate a friendship (Herek & Capitanio, 1996; Levin, van Laar & Sidanius, 2003), relation that includes a common goal (Cook, 1985), and interactions with a person who moderately disconfirms prevailing stereotypes (Blanchard, Weigel & Cook, 1975; Reinke et al, 2004). Social activism, or protest, is the third form of stigma combat. Protest strategies highlight the injustices of various forms of stigma and censure offenders for their stereotypes and discrimination.

The contact strategy seems to be the most promising method of fighting mental illness stigma. Still, it is obviously more difficult to apply on a large scale than e.g. education. There is some evidence that joining these two methods might be particularly beneficial (Rüsch, Angermeyer & Corrigan, 2005). A recent meta-analysis of 79 studies representing 38,364 research participants from 14 countries has demonstrated that both education and contact have positive effects on reducing the public stigma of mental illness. However, contact has been found to be better than education at reducing stigma for adults, whereas for adolescents, the opposite pattern has been found (Corrigan et al, 2012).

Fundacja eF kropka (Foundation eF point) – a Polish initiative promoting social inclusion of people with mental illness

In Poland, the predominant model of mental health care is still hospital-centered with coexisting ambulatory care. Although in recent years the number of psychiatric wards in general hospitals has increased, as well as day hospitals and community-based facilities, the reform is not progressing as fast as it should be due to the organizational and financial issues.

One of the first Polish organizations addressing stigmatization and social exclusion of people with mental disorders was the "Open the doors" Association from Kraków. On the local level its members educated medicine and psychology students, as well as mental health services providers about service users'

discrimination and promoted social inclusion ideas. Now their work is followed in Warsaw by the Foundation eF point (Fundacja eF kropka). It is a non-governmental organization formed at the initiative of people professionally involved in helping persons with mental illness experience as well as providing them with therapy. The Foundation's attempt is to change the negative assumptions about the outcomes of mental diseases, convictions rooted in social awareness and patients' self-perception. The mission of the Foundation is to prevent isolation of people who experienced mental crisis, counteract social stigma and dispel stereotypes about mental illnesses. It is by means of multi-dimensional therapeutic activities that hope to build a basis for breaking the barriers or personal inhibitions enabling a return to natural activity and roles in personal and social life.

In collaboration with the owners of Warsaw famous restaurant, the Foundation runs a program of professional traineeship in gastronomy "Together in the kitchen". It is innovative in a sense that it integrates socially engaged business with socially stigmatized people. Persons after psychotic crisis (trainees who are being helped in recovery) as well as the trainers – restaurant staff who introduce partnership paradigm are the target group of the program. Another initiative of the Foundation is an educational portal. Volunteers – who experienced mental health crisis themselves – will be running it, supported by professionals. This portal will focus on promotion of mental health and ways of dealing with mental crises. It will be addressed to all stakeholders: people with mental disorders, their families, professionals, media, and policy makers.

"Together against stereotypes" – using contact and education to fight mental health stigma

To respond to the major problem encountered by people with mental disorders, i.e. social stigma, the eF point Foundation created a project "Together against stereotypes" submitted to the Ministry of Labor and Social Policy, planned for 2015-2016. The project involves experts by experience activity. They will be trained to become educators and will use acquired skills to run anti-discrimination trainings for various stakeholders groups (employees of Job Agency, Institute of Psychiatry and Neurology, Alzheimer Center in Warsaw). At the next stage of the project implementation, police and priests will be educated. The main purpose of the project is to counteract stigmatization and discrimination of people who experienced mental illness through social and professional activation. Its detailed objectives include:

1. raising self-esteem, self-agency and sense of responsibility for one's actions of the people who experienced mental illness, i.e. empowerment according to recovery-empowerment theory;
2. improving co-operation, effective communication and task completion skills of the people who experienced mental illness;
3. developing training management and training materials preparation skills of people who experienced mental illness;
4. raising awareness of the discrimination of other minority groups among the project participants;
5. increasing satisfaction from the performed work of people who experienced mental illness;

6. acquiring skills necessary to be an affective educator – expert by experience – by people who experienced mental illness;

7. raising professional competences and the level of knowledge of the participants of anti-discrimination trainings (employees of Job Agencies, Institute of Psychiatry and Neurology, Alzheimer Center in Warsaw); and

8. raising awareness of the needs of people who experienced mental illness among Warsaw inhabitants and increasing openness to developing social and professional relations with people affected by such diseases.

Trainings about illnesses and treatment methods are usually run by professionals. What makes this project innovative is expert by experience involvement in teaching. This enables to transfer substantial knowledge with new perspective, beneficial for trainees, as well as trainers. It is composed of two elements, i.e. two effective anti-discriminatory methods. Firstly, it educates society through direct contact and an informative promotional campaign. Secondly, it educates, supports and empowers patients in their re-entry to the public life – a method against self-stigmatization. Self-stigma can be perceived as the polar opposite of empowerment (Corrigan, 2002; Corrigan, 2005a; Corrigan & Watson, 2002). In this approach the focus from dealing with social stigma is moved to fostering personal empowerment.

Empowerment is now understood as a complex concept. It encompasses a number of phenomena relating to changing the social perception of mental disease, reforming the operations and rationale of medical care and social welfare, and changing the intra-psychic and behavioral dimensions of patients themselves. It combines both process and outcome (Fitzsimons & Fuller, 2002). All individual and social actions (education, training, volunteering, changing the health care system) which take service user agency into account and implement the before mentioned goals fit the empowerment agenda.

Conclusions

Professional help for people with mental illness experience is something more than the purely medical model. It requires instigation of hope and realistic goal setting. Clinical and community observations have demonstrated that discrimination, labeling and stigma lead to social exclusion and imply high individual and social costs. Efforts are now being made to find ways to prevent or reverse social exclusion of service users. On the societal level, this means encouraging complete functioning in society, assuming responsible roles and social engagement. On the individual level, it means motivation and self-determination.

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RECOVERY-ORIENTED SERVICES – THE ROLE OF TRAINING IN TRANSFORMATION

Abstract

Recovery oriented practice / service provision – is how workers and services support people in their recovery journey. There are four identified practice domains: promoting citizenship, organizational commitment, supporting personally defined recovery, and working relationship. Professionals might be helpful if they are willing to be open, respectful and use their qualities as partners in healing, rather than "we – they" approach with paternalism and disempowerment. Also language matters in psychiatry, it is claimed to have the potential to contribute either to stigma and social exclusion or to people' empowerment. One approach to supporting practice change is through well designed and aligned with the emerging conceptual dimensions of recovery training – users as well as providers needs some education how to benefit from the on-going reform.

Introduction

> *We need to create an optimistic, positive approach to all people who use mental health services. The vast majority have real prospects of recovery – if they are supported by appropriate services, driven by the right values and attitudes. The mental health system must support people in settings of their own choosing, enable access to community resources including housing, education, work, friendships – or whatever they think is critical to their own recovery.*
>
> The Journey to Recovery – the Government's vision
> for mental health care (DoH, 2001, p. 24)

Recovery

There is a broad heterogeneity in regards the outcome of serious mental illness (Carpenter & Kirkpatrick, 1988; Davidson & McGlashan, 1997). A number of people may recover from an acute episode of psychosis in ways that are similar to recovery from acute medical conditions; some others recover over a long period of time, after many years of disability. In this context recovery paradigm should not to be confused with cure but rather implies the provision of accommodations and supports that enable people with psychiatric disabilities to lead safe, dignified, and full lives in the community (Davidson et al., 2006).

Recovery has been understood as a vision, a philosophy, an attitude, a life orientation, an outcome and a set of outcomes (Silverstein & Bellack, 2008). The recovery process is a highly individualised, personalised journey and everyone has his or her own pace, often with the involvement of great suffering and unpleasant flash-backs, but also leading to transformation and personal growth. A person may experience more than one form of recovery at any given time, as well as move in and out of different forms of recovery over time (Davison et al., 2006), it may occur in distinct stages or phases which are characterised by qualitative differences in

behaviour (Tse et al., 2014). The metaphor of a spiral is suggested to illustrate its nature more clearly than the stages approach since often individuals revisit earlier stages before progressing on to later ones (Slade, 2009), moreover this concept is often disputable as labelling a person with "acquired stage" (Davidson et al., 2010). The most often described elements of recovery are: hope, autonomy and self-management, personal growth, capacity to change, tolerance and forgiveness, personal responsibility and productivity, peer support and community life, acceptance and self awareness (Deegan, 1998; Mead & Copeland, 2000). What is worth to note is Deegan assumption about paradox of recovery, i.e., that in accepting what users cannot do or be, they begin to discover who they can be and what they can do (p. 14). She therefore promotes individualised, recovery oriented rehabilitation programs with flexible structure, and also indicates that consumer-run self-help groups, self-help networks and advocacy groups as important resources for recovering persons. Mead and Copeland (2000) expect attitudinal changes in mental health professionals as well as training how to figure out what work for recovering people and what are the steps needed to take in their own behalf. Few years ago consultant psychiatrists from United Kingdom (SLAM/SWLSTG, 2010) published a document on key dimensions in recovery: hope, agency and opportunity. What makes it exceptional is the agency and opportunity component. Recovery means service users taking control over their own problems, the services they receive, and their lives. It is concerned with self-management, self-determination, choice and responsibility (p. 5). In this context recovery can be seen as a values-led approach which is focused on social and personally-valued outcomes. Essential to these values is partnership with many others within and beyond professional boundaries. The authors recommend to put a greater emphasis on recovery paradigm in the psychiatrists' education and training at the undergraduate and postgraduate levels. This includes the development of the skills, knowledge and support to promote successful self-care, self-management and self-directed care.

Recovery oriented services

Personal recovery is a journey undertaken by people with lived experience of mental illness, recovery oriented practice / service provision – is how workers and services support people in their recovery process. Professionals might be helpful if they are willing to be open, respectful and use their qualities as partners in healing, rather than "we – they" approach with paternalism and disempowerment.

The transformation of systems towards person oriented practice, not illness focused foster its ability to realise full potential (Anthony, 2000). Appropriate self-revelation can help break down the professional barriers that create mistrust (Turner-Crowson & Wallcraft, 2002).

The Guidelines for Recovery Oriented Services were developed by the Quality Management Committee of the American Association of Community Psychiatrists (Sowers, 2005). The guidelines are composed into three quality domains of service administration, treatment and support. Author emphasises that heir implementation requires a transformation of the way providers have been trained to think about their professionals roles – to learn how to be facilitative rather than directive, hope inspiring rather than pessimistic, autonomy enhancing rather than paternalistic (Sowers, 2005). In Le Boutillier et al. (2011) qualitative analysis of international recovery-oriented practice guidance the authors identified four practice domains:

promoting citizenship, organizational commitment, supporting personally defined recovery, and working relationship. To operate within a recovery framework, services need to balance the tension between addressing both the priorities of service users and the wider expectations of the community (p. 1475) – on a service provider level, recovery can present particular challenges in accommodating self-determination and choice along with the public protection expectations on the system.

To illustrate transformation challenges it is worth to cite some concerns about recovery in serious mental illness (Davidson et al., 2006, p. 640), derived by author from a series of presentations, discussions, and training sessions:

- *recovery-oriented care adds to the burden of mental health professionals who already are stretched thin by demands that exceed their resources. "You mean I not only have to care for and treat people, but now I have to do recovery too?";*
- *recovery means that the person is cured. "What do you mean your clients are in recovery? Don't you see how disabled they still are? Isn't that a contradiction?";*
- *recovery happens for very few people with serious mental illness. "You're not talking about the people I see. They're too disabled. Recovery is not possible for them.";*
- *recovery only happens after, and as a result of, active treatment and the cultivation of insight. "My patients won't even acknowledge that they're sick. How can I talk to them about recovery when they have no insight about being ill?";*
- *recovery can be implemented only through the introduction of new services. "Sure, we'll be happy to do recovery, just give us the money it will take to start a (new) recovery program.";*
- *recovery approaches devalue the role of professional intervention. "Why did I just spend ten years in training if someone else, with no training, is going to make all the decisions?".*

Recovery oriented services – implications for practice

One approach to supporting practice change is through training. Studies in the USA (Peebles et al., 2009) and in Australia (Salgado et al., 2010) indicate that structured training on critical components of recovery can increase both knowledge and pro-recovery attitudes, as well as let trainees hear different perspectives on client care. Some trainings are conducted mostly by researchers and clinicians (Crowe et al., 2006), others are run by consumers (Young et al., 2005). A randomized controlled trial (Cook et al., 1995) found that staff educated by a consumer trainer had more positive recovery scores than did those by a non-consumer trainer.

In Tsai (et al., 2010) study authors examined the types of recovery-oriented training at two state hospitals and the impact of the training on staff recovery attitudes. Recovery-oriented training was grouped into one of two categories: specific/practical skills training or general/inspirational training. General/ inspirational training included Roadmap to Seclusion and Restraint Free Mental Health Settings, "'comfort room' workgroups, 'bridge building'", and Respect seminars (p. 337). Specific/practical skills training included trainings on Illness

Management and Recovery, Integrated Dual Disorders Treatment, Wellness Recovery and Action Planning, the Matrix model, and motivational interviewing (p. 338). Staff who received specific/practical training had a greater increase in agency recovery attitudes than staff who received only general/inspirational training or no training.

Gilburt et al. (2013) evaluated the four full-day workshops and an in-team half-day session on supporting recovery. The trainers represented professional expertise and lived experience. The intervention was offered to 383 providers in 22 multidisciplinary community and rehabilitation teams providing mental health services across two bordering regions. Day 1 was introductive in regards recovery and the different elements that constitute a recovery approach. During the Days 2 and 3 trainers used training package *Psychosis revisited – a psychosocial approach to recovery* (Basset et al., 2007). Day 4 covered different topics: assessment and care planning from service users' perspectives; social inclusion/vocational activities from a social work perspective; carer perspectives on recovery; spirituality and reflection on personal values and beliefs, strengths based approaches and the role of hope. A half-day meeting with participating teams was held, to support team members to reflect on the active part of the training, and to discuss practical use of the training content. 89% staff attended at least one training session, and 48% attended all four workshops. The training program had a positive impact, with change in the content of patient's care plans and the attributed responsibility for the actions detailed. What is surprising in the authors' results is that there was much confusion about what "recovery" meant and subsequently what is participants' perceptions of recovery-orientated practice. Secondly recovery was perceived as something that professionals do, many trainees believed they "already did recovery".

It means that users as well as providers need some education and training how to benefit from the on-going reform: empowerment (individual and social) paradigm, partnership and consistent with recovery words and language.

Recovery oriented language

> *Words are important. The language we use and the stories we tell have great significance to all involved. They carry a sense of hope and possibility or can be associated with a sense of pessimism and low expectations, both of which can influence personal outcomes.*
>
> Devon Partnership Trust and Torbay Care Trust (2008, p. 2)

Language matters in psychiatry (Walker, 2006). It is claimed to have the potential to contribute either to stigma and social exclusion or to empowerment of people using mental health services (Dickens & Picchioni, 2011). Professionals should accept that people often talked about the onset of their first breakdown using everyday language such as "stress", "depression", "trauma" rather than talking about the onset of a mental illness. Most people who may be described as in recovery from mental illness neither think nor talk about the term "recovery" at all. They talk about getting a job, making friends, having faith, living on their own, and generally getting their lives back.

It is also worth to note that a variety of terms are used by health and social care professionals and by service user groups to refer to people with mental disorders. The terms used include "patients", "clients", "service users", "people affected by

mental illness" (Simons et al., 2010). Health service user groups advocate the terms: "ex-patient", "psychiatric inmate", "survivor" (Chamberlin, 1990) or "user" (Neuberger & Tallis, 1999). A systematic review of the empirical studies about the terms used to refer to people who use mental health services revealed that the terms "patient" or "client" were indicated most often by respondents as preferable ones, with "patient" being the most popular in the UK and "client" being regarded as the best option in the US (Dickens & Picchioni, 2011). In Polish study (Anczewska et al., 2011) also the term "patient" was the most preferred one, as well as by the recipients (76,2%), as the providers (87,7%) of the services.

Conclusions

The aim of the effective services provision, set in a positive culture of healing, is to assist users in the process of recovery and social inclusion. Services transformation into recovery-oriented ones forms specific challenges, namely in accommodating self-determination and choice along with the public protection expectations on the system. One approach to supporting practice change is through well designed and aligned with the emerging conceptual dimensions of recovery training – users as well as providers needs some education how to benefit from the on-going reform.

Acknowledgements

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SUSAN STOCKTON & TERRY MCNEELEY

A VIRTUAL WORLD CASE STUDY – QUALITY, SOCIAL JUSTICE, AND ACCOUNTABILITY IN A SIMULATION-BASED EDUCATIONAL ENVIRONMENT

Abstract

This paper examines the application of quality, social justice/equality and accountability/responsibility of teaching and learning in an online educational environment. Components addressed in this paper include a brief inspection of online teaching and learning methods, qualities of online teaching and learning, and the responsibility of teaching and learning with virtual simulations. An appraisal of possible disparity between technology applications by institutes of higher learning and how to address concerns of inequality, in regards to utilization of distance education opportunities, will be discussed. Addressing issues of equality, responsibility and lifelong learning via distance education will be mentioned. Examples of one approach to address these concerns from a case study perspective will be provided. The approach will demonstrate simulation-based learning for a general education course using the virtual world known as Second Life.

Keywords: technology, simulation-based learning, online education, virtual world

Introduction

The hallmarks of any educational system are or should be quality, social justice, and accountability (Rossouw, 2015). These tenets have myriad meanings and applications across the various institutions and methods of teaching and learning. Determining the degree to which an educational system has achieved adequate or exemplary quality, social justice, and accountability may be from the success of her graduates, reviews from peer organizations, recognition from accrediting agencies, contributions to the body of knowledge, awards for academic, philanthropic, humanitarian, scientific, or technological advances. In regards to technology, new delivery systems of education have emerged, e.g. simulation-based learning, virtual reality, online compared to traditional classroom environments, blended course designs, etc., regardless of the mode of delivery, the ability to maintain the same degree of teaching excellence is requisite.

Online Learning

Online or distance learning provides students and educators from around the world unprecedented access to knowledge and information (UNESCO, 2015). Thus universal access to high quality education is the key to building peace, sustainable social and economic development, and intercultural dialogue for the benefit of all (UNESCO, 2015; Rossouw, 2015). This report examines a virtual world environment (VW), defined as existing where a user/student is logged on to a computer, populated by many users simultaneously, provides the impression of three dimensional space, avatars represent users in-(virtual) world, and with the capability

of communicating with other users via a chat function (Inman, Wright & Hartman, 2010). The example of a VW for this discussion will be Second Life (Linden Labs, 2003). Second Life allows students to design the appearance of their avatar and engage in activities that might not otherwise be possible in the real world due to physical conditions, living location, comfort level interacting with peers in face-to-face situations, as well as opportunities to meet individuals from other cultures and around the world (Ahern & Wink, 2010; Adbulova, Krylova & Minyurova, 2014).

According to Atchley, Wingenbach and Akers (2013) there were approximately 3.9 million enrollments in online courses in the United States in 2008 (Allen & Seaman, 2008). Nagel (2014) reports that students enrolled in exclusively online courses number one in ten and when combined with those taking part of their course load online equaling over 25 percent of student enrollments in the USA in 2012. Analysis conducted to compare student performance, course completion, and retention rates according to discipline found that more students received letter grades of A in online compared to traditional classroom style, students in online courses had the lowest course completion rates, and retention of students based on course discipline found finance the lowest and reading the highest retention rate among online delivery (Atchley, Wingenbach & Akers, 2013). When comparing traditional classroom instruction with online methods, the desire to create new learning opportunities, new approaches to skills development, and new ways of integrated communication, collaboration and information exchange are made possible within the digital framework of VW (Heid & Kretschmer, 2009). The transposition of role play, case-based learning, scenario-based learning, learning through storytelling, social learning, learning of languages, cultures, models, and feedback is possible within the simulation-based platform mimicking those practices within the traditional classroom (Bai, Lavin & Duncan, 2012). Online classroom management skills may involve slightly more attention to presumed or common knowledge. A list of supportive practices for online students includes (Houle, 2014):

- Be Responsive – return emails promptly, announce scheduled response times;
- Be Accessible – make adjustments in office hours for time zone differences;
- Be Friendly – be open and understanding in voice;
- Be Inclusive – address the online student equally with face to face students;
- Be able to familiarize them with the unique elements of the campus;
- Facilitate Collaboration – allow for group interaction;
- Be Accommodating – should students visit the campus be prepared to make their visit meaningful and memorable;
- Connect them with the institution – help provide a sense of belonging;
- Make Connections – other students, mentors, advisors, etc.;
- Be Welcoming – establish an orientation for your online students, virtual tour of campus, the school library, contacts such as your office staff and academic advising.

Second Life

With the foregoing tenets in mind Second Life (SL) may create additional barriers to students' online learning/learning experience. Barriers to successful learning in SL are attributed to both objective issues, such as the complexity of

accessing and learning the navigation capabilities, technical difficulties in computer-processor interface, time-consuming, and subjective, not what the students were expecting (SL did not live up to preconceived notions), boring, frustrating, tedious, and overwhelming (Sanchez, 2009). Other researchers have found that SL did not contribute to hypothesized meaningful growth and realization of goal-oriented, collaborative, conversational, and immersive characteristics (Keskitalo, Pyykkö & Ruokamo, 2011). Proponents for SL in education suggest that the SL experience can facilitate innovations in pedagogy through:

- Extended or rich interactions – social, human-object, human-artefact;
- Visualization and contextualization – content not accessible by other means;
- Exposure to authentic content and culture;
- Individual and collective identity play;
- Immersion – affective, empathic, and motivational aspects of the virtual 3D embodiment;
- Simulation – manipulating real world situations too costly or dangerous to reproduce by other methods;
- Community presence – promotes a sense of belonging and purpose that coheres around groups, subcultures, and geography;
- Content production-opportunities for creation and ownership of learning (Warburton, 2009).

While these facets of SL teaching potentiate the stage for improved learning, the learner traits must be considered for meaningful interactions and knowledge retention to occur. Specific characteristics of SL learning environments for student success mandate cognizance of learners' needs, cultures, prior learning, previous experience and personal circumstances. Also there is the pre-requisite ability for instructors to learn *from* SL as well as provide for students to learn *within* SL (Bell, 2009). Use of SL across multiple disciplines has been explored with positive outcomes in the fields of health, medicine, nursing, education, aviation, criminal justice, creative writing, literature, foreign language, sociology, anthropology, and industrial safety management (Hughes & Oliver, 2010; Mahon, Bryant, Brown & Kim, 2010).

Practice-based learning is especially important for fields of study where physical techniques are critical elements of the curriculum, e.g., medicine, nursing, emergency response professionals. Second Life can intertwine comprehensive learning materials with effective pedagogy for simulated clinical experience in an immersive social environment (Rogers, 2011). Technical skill simulation, while not replacing the need for real-world practice, can allow for team-based exchanges and appropriate application in the instructor provided scenarios. Similarly, work by Loke, Blyth and Swan (2012) found that dispositional behaviors could be evaluated in scenario-based activities by measuring the frequency with which students recognized or omitted an opportunity to engage in a particular dispositional behavior, i.e., compassion. Typical of professional practice in medicine is the team or collaborative system for patient-centered care. Di Blas and Paolini (2012) discovered that multi-user virtual environments (MUVEs), like SL, prove highly effective in fostering transversal skills, especially collaboration (both locally and remotely). They conclude the following seven MUVEs lessons for fostering collaboration:

Lesson 1 Provide a common, overarching goal perceived as meaningful;
Lesson 2 Split activities into doable tasks;

Lesson 3   Link tasks together;

Lesson 4   Support the expression of diverse talents;

Lesson 5   Provide (mandate) collaborative "sparks";

Lesson 6   Deal with multi-faceted rather than "square" topics; and

Lesson 7   Give space to the teachers' contribution (Di Blas & Paolini, 2012).

Collaboration begins with interaction and interaction with setting the stage, e.g., social "lounge", cultural orientation, technology integration with the outcome evaluation revealing cultural identity, evidence of collaborative process and affect (Yang, Huiju, Cen & Huang, 2014). Additional qualities identified with improved learning using SL delivery system hinge upon the degree to which the student can identify with their selected avatar, how confident and proficient they feel with learning by teaching and how they receive recursive feedback (Okita, Turkay, Kim & Murai, 2013). Ultimately, all learning rests within the teacher-student connection, however well that is forged, along with the accountability and responsibility for the efficient exchanges experienced therein (Kuhlenschmidt & Kacer, 2010).

Case Study

One course from the general education curriculum (Personal Health – PH) and one from within the Health Studies degree program (Health Program Planning and Evaluation – HPPE) were diagnosed for online delivery. The general education course, PH, had previously been instructed as a strictly face to face course while HPPE was created as an online course. Faculty met with instructional technology developers to consider possibilities for creating rich online learning environments incorporating similar activities from the face to face for PH and for enhancing the online HPPE course while simultaneously achieving course objectives using SL.

Personal Health

Demographics for PH are typically first time freshman students with a mean age of 19 years and slightly more female than male students. Class enrollment ranges from 25-35 students. The course topics address the history of health and welfare, dimensions of wellness, stress, psychological health, fitness and exercise, alcohol, drug, and tobacco information, cardiovascular health, nutrition, weight management, the immune system, reproductive health, sexually transmitted infections, environmental health, personal safety, aging, and death and dying topics. When teaching the face to face class various in-class activities were utilized to capture students attention and prevent the course from becoming monotonous or boring, as little if any learning takes place when students are bored or out of focus.

To prevent an inattentive brain, a VW was created in SL that simulated a typical mid-western USA city, e.g., medical clinic, gas station, car dealership, health food store, art gallery, senior assisted living facility, factory, residential, Public Park, and fast-food establishments. Various tasks were given to the students to navigate around the virtual town, traversing from medical clinic to fast food to residential areas while avoiding being hit by traffic (run over by a bus). Students were provided opportunities to be creative by taking a taxi or bus to different locations, renting a scooter to explore the virtual town, or walking. Instructions on how to fly were not included in the directions for completing assigned tasks but if they read carefully they could discover how this option was possible in a VW.

The original vision impairment exercise deployed in the face to face class utilized cardboard eyewear with certain areas of vision restricted either by a solid piece of material or obscured with clouded plastic, simulating various common types of age-related vision loss. When adapting this exercise for the online environment, the first concept was to simply create a downloadable pdf version of the cardboard eyewear, and instruct the students to print and cut out each version of the eyewear used in the face to face equivalent. A possible liability issue was identified as students in the face to face exercise are assisted by another student (non-visually impaired), preventing the temporarily vision impaired student from injury while negotiating the real world classroom. However, in the first online variant, no such guarantees can be assumed. What would be the institution's responsibility if an online student, while wearing visually restrictive eyewear as part of an assignment, steps out into traffic and is injured or killed? A solution was identified to move this activity into a virtual world simulation. The student may still maneuver their avatar into virtual traffic, but no one is injured, not even the avatar.

The objectives of the assignment were to introduce students to different physical (mobility and vision) impairments, providing a virtual experience that everyone in the class could undertake in a consistent manner. To complicate these excursions various impairments were embedded in the simulation-use of a wheelchair for the mobility impairment and for vision disabilities those commonly associated with aging, such as simulations of macular degeneration, various retinopathies, and cataracts. Students commented that a cataract was the worst sensation of all. Comments included statements like "I wanted to clean the computer screen or my glasses to remove the cloudiness from my field of view". Students were asked to travel up a short set of stairs using a virtual wheelchair, a near impossible task in the real world. This was designed as an exercise in frustration, yet most students assumed it was possible or it would not have been assigned. In frustration one student asked, "Is this even possible?" The response was in the form of a question, asking the student, "Would you be able to climb a few stairs in a wheelchair in 'real life'?" Students felt that the experiences within SL provided them a deeper understanding of what these aging situations "felt" like and increased their empathy for individuals afflicted with mobility or vision impairments. The overarching goal of this simulation-based learning was for students to examine their behavior and attitudes for increased empathy towards others and how to investigate strategies to achieve life-long positive health outcomes.

Health Program Planning and Evaluation

Demographics for this course include junior or senior level students prior to their internship component of a Health Studies degree. Age ranges are usually 20-22 with more female than male enrollments. This online course was designed to empower students to work in groups as well as individually to accomplish course objectives. Assignments included such tasks as assessing the virtual community for positive and negative health risks. Their navigation was not hindered by any disability or impairment but they were required to use critical thinking evaluating advertisements in the health food store and healthy food choices from the fast food restaurant and convenience store. They were also to use their text content to evaluate the needs of the community with current epidemiologic data. Students were instructed to select a community health service they would like to explore in more detail and

provide that service to the SL simulation. Students created pdf files of posters that could be mounted in the art gallery for the class to view announcing the health service they were going to provide. This activity created the ability to synchronously compare and contrast peer work, an ability that would not have been as evident within the typical classroom environment. This project developed over the entire course and culminated with a short PowerPoint presentation delivered within the art gallery. This course also provided the instructor with a formative assessment opportunity to determine the depth of knowledge students represented by their performance with food purchases, environmental surveillance, community needs, ability to contribute to group assignments, etc. The goal of this exercise was to have students apply the course text to a typical setting while learning via simulation within SL. The use of a virtual world simulation places each student on near equal status as social/racial/economic diversity are reduced or removed in entirety.

Conclusion

One of the best examples for how education can be designated as of substantial quality, upholding social justice, and be accountable for the trust imbued is through the attributes, capabilities and motivations of her graduates. "These are some of the capabilities that should be identified as part of our graduate attributes and woven into the fabric of our courses in the activity design. We need to have transformation at the core of what we do as teachers, if it is all about the students" (Carrington, 2015). Among the plethora of teaching modalities, mediums, curricula, and frameworks there is a need to look across disciplines and cultures, to explore deeply, for methods that connect teacher and learner. The optimization of the educational experience, whether online or face to face, is an opportunity for all to grow, to advance in embracing lifelong learning. Where that learning is scrutinized by both internal and external validating professionals or agencies for adherence to published objectives, while instilling that somewhat nebulous albeit altruistic quality of life-long learning is the epitome of quality, social justice, and accountability in education (Brandenburg & Wilson, 2013; Rossouw, 2015).

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CHALLENGES AND HURDLES

EXAMINING VET TRANSITION SYSTEMS IN DIFFERENT EUROPEAN COUNTRIES – DUE TO PARTICIPATION OF VULNERABLE GROUPS

Abstract

Educational and vocational research shows that there are considerable numbers of adolescents and young adults in the European member states who are failing to make the transition from school to vocational education and training (VET). In many European countries the formal educational systems, have made considerable progress in meeting the demand for integrative education and training concepts, but there is a lack of concepts and systems targeting vulnerable groups and in particular migrants, refugees, asylum seekers and other minorities subject to discrimination. The goal of a Leonardo da Vinci Partnership "Integration of vulnerable groups, focused on the transition from school to vocation or world of work" has been to identify problems in transition to the world of vocational education and training or to the world of work, and to develop a tool for targeted local and regional planning of education and training.

Rationale

People in vulnerable groups, and especially adolescents and young adults in these groups, are exposed to greater risk of failure in integration into vocational training and access to the world of work, due to the current financial and economic crisis in Europe. One in three Europeans of working age has few or no vocational qualifications; the employment rate of those with poor qualifications in the EU as a whole is only 49%. According to EU figures, there are nearly 23 million people out of work and an estimated 113 million on or below the poverty line, at risk of social exclusion. On the other hand, as the demographic changes progress there is a lack of qualified people in the European labour market. Many of the problems have become worse due to the financial and economic crisis (European Parliament, 2013).

All of these factors make the upcoming EU strategy 2014-2020 all the more important, including measures to combat social exclusion and poverty. By 2020, about 35% of all jobs will require a high level of qualification, increasing the pressure on young people. At present 15% of 20 to 24-year-olds in the EU member states have no employment and no vocational training (European Parliament, 2013). This particularly affects a number of risk groups, varying from country to country. They are at risk of exclusion and discrimination in the vocational education and training systems (VET) and in the labour markets of the European countries, and are often left out at the periphery of society. So it is very important to ensure that the VET systems are open to young people in the vulnerable groups, enabling them to take their opportunities for education and training, and to develop their potentials.

Across Europe migrants and ethnic minorities tend to have lower employment rates than host country nationals. In 2010, when the overall employment rate in the European Union was 64.1%, the employment rate of non-EU citizens was only

55.2% (Cedefop, 2013). Non-EU citizens are more likely to be unemployed because of inactivity and job mismatch, which are sometimes associated with perceived discrimination and negative views on migration (Cedefop, 2011). Migrants should have the opportunity to learn the language of the receiving country, to have access to employment, health and care systems, as well as to have the economic capacity to support themselves. They should be better equipped with the skills required in the labour market and receive better support to overcome barriers, such as discrimination, unrecognised skills and qualifications, inadequate information, advice and guidance.

Mapping and comparing local VET transition systems in five countries

A number of European countries make efforts, at least sporadically, to build up and institutionalise a vocational *transition system*. It is well known that the players involved in the design of educational courses related to the world of work have to try in cooperation with businesses, educational and labour administration and with the youth services to improve the interfaces between the various sub-systems. The transition systems from school to VET and work comprise a wide range of programmes and sub-programmes:

- Programmes of career guidance and teaching of first vocational skills are provided in secondary schools, and young people can do internships in companies, they can request vocational guidance from the job centres, etc. Many secondary schools work with VET schools to prepare the transition for young people from one sub-system to the next one in good time, and to support them in this process.
- If young people do not succeed in finding a job or getting into VET immediately after completing their general school education, they can make use of specific courses and education programmes designed to prepare school students for vocational training after they have acquired a final certificate from their general education school, or after the end of their regular schooling time at a general education school. These education programmes and courses are often conducted by non-governmental organisations.
- In some EU countries there are programmes run by school and out-of-school education providers that do not give full vocational training qualifications but include elements contributing to vocational qualification, and these can later be counted towards a certificate of vocational training or fulfil conditions required to enter full vocational training.
- The transition system also includes all programmes for additional language promotion (for illiterates, for migrants, etc.), job application training, computer courses, e-learning, etc.
- The transition system also includes all social support programmes – counselling, supervision, mentoring, and accommodation groups, residential schools, study grant programmes, etc., that are needed to secure successful vocational qualification.

In our research we tried to identify the differing characteristics and legal frameworks of the VET systems in each partner country. In some of the partner countries we found that the access to VET systems is more or less easy whereas in

other countries there are legal obstacles in terms of access to education and employment. All partner countries identified problems relating to risks of exclusion. One of the central reasons for the existence of numerous exclusion mechanisms is the orientation of vocational education systems in general. Most are oriented towards the legal and educational standards which have become fixed in a national context resulting in the creation of barriers which members of vulnerable groups encounter when they enter the respective country system. These barriers often prevent the vulnerable groups from further developing their educational and working careers.

- Bulgaria has a national policy and a centralized, school-based VET system. There are no legal restrictions, but, no special attention of problems is paid, which vulnerable groups have, which hinders the transitions within the country.
- In Finland there is a national education policy, and the VET system is school-based. Access to basic educational and vocational institutions and same social benefit is guaranteed for all young adults. Mother tongue language is important to acquisition of other languages, but preparatory programmes are too short. There are needs to enable "late arrivals" to get access in VET.
- Ireland is divided in 33 Regional vocational education committees; the VET system is school-based. Type and duration of legal status is determining the level of funding. There is a lack of language support, understanding immigration system and process, and VET guidance.
- Germany has 16 autonomous Federal States. The VET system is based on a combination of schooling and apprenticeship. Migrants have problems in getting access to work permit, language courses, dual system and all kinds of VET opportunities. The formal and non-formal system is often separated. School management is not qualified; there is no recognition of informal competencies.
- Turkey runs also a national and centralized policy, but with significant regional differences (urban and rural areas). The VET system is school-based. There are no legal restrictions for migrants to access school- and VET system. But there is no specific educational (VET) policy for vulnerable groups.

One of the central reasons for the existence of numerous exclusion mechanisms is the orientation of vocational education systems in general. Most are oriented towards the legal and educational standards which have become fixed in a national context resulting in the creation of barriers which members of vulnerable groups encounter when they enter the respective countries. These barriers often prevent the vulnerable groups from further developing their educational and working careers. As lateral entrants, they become outsiders because the educational programs and formats tend to be oriented towards homogeneous groups and because, as a rule, they are explicitly tailored to the requirements and normative rules of the labor markets of the respective host countries.

In some countries a holistic approach is not being taken in relation to the problems and experiences of vulnerable groups. Problems experienced by vulnerable groups include issues relating to health, language, intercultural learning, networking and links between schools and the world of work, domestic circumstances and the

separation of families. There is a lack of understanding of the rights, entitlements and other needs of vulnerable groups by education providers, teachers, and counsellors.

Financial supports and access to funding for vulnerable groups differ in each partner country. The achievement of a VET qualification can be dependent upon whether the individual is continually exposed to poverty or financially secure. However financial security does not always ensure success. On a structural level, different financial conditions were identified in relation to the facilities of the various VET systems (quality of programs, scope of curricular, funding to offer support for special needs).

A comprehensive tool to examine local VET transition systems

Bearing in mind the life situations of particularly vulnerable groups, it is evident that the conditions and quality of the transition systems are often not appropriate to ensure successful movement into VET and employment. Discussions on monitoring instruments showed that *index instruments* are applicable and very supportive tools for transition management (Parreira, 2006). But so far only a few of these tools have been set up. The Learning Partnership developed a local index instrument[1], which helps to reflect on demands in the existing particular transition system. We were inspired by the "Index of Inclusion", which was originally developed by the British educationalists Mel Ainscow and Tony Booth and has been translated into many languages (CSIE, 2015). The word "Index" has many different meanings. It can be a table of contents, a list, an indicator, a system of reference tags, or a table of key words.

The central methodological element of an Index is a list of questions designed to work out the status quo, the problems and obstacles, and the needs and recommendations. There are no "right" or "wrong" answers to these questions, but rather this is a systematic, structured analysis of the issues affected by the questions. Thus the list of questions permits initiation of discussion and reflection processes locally, monitoring and further development and helps to set the process going elsewhere. Thereby, the questionnaire shall help to initiate a change of perspective which stimulates the inclusion of members of vulnerable groups, and to build and improve the skills of process monitoring staff in support to municipalities and regions for work.

The tool is designed in such a way that it can be used in various contexts, depending on closeness and responsibilities for individual subgroups of participants. It can be the starting point for concept debates, or a useful aid for team meetings, a tool for quality management, for use in teachers' conferences, or it can be used for development and implementation of pilot schemes.

The tool prepared by the Learning Partnership is focused exclusively on the setting of the transition from school to work. It is tailored to a selection of categories which have key importance in the experience of the participating experts. The

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[1] "Fit for Purpose: Examining the local VET system and the integration of vulnerable groups. A comprehensive tool to assess the suitability of supports for vulnerable groups in transitioning from school to vocation and to the world of work." After June 2015 the instrument will be available as a download on the TransVet project Web-Side.

authors decided to take this approach because they have learned from their own practice that institutional re-orientation processes are challenging and that time resources for their implementation are often limited by the pressure of practical everyday work. The list of questions for discussion is arranged in six categories:

- *Target group:* The first set of questions is related to the educational subjects, because individual life situations and specific disadvantage symptoms are as different as the overall spectrum of the vulnerable groups themselves. Relevant points include knowledge of their individual life situations, the relevant legal framework applicable to them, the responsibilities in the institutions, and target group relevant problems due to structural exclusion mechanisms.

- *Institutional transition:* Other questions are referring to the special characteristics of the work setting in the transition system. In order to respond to specific problems in the transition system, it is advisable to examine the specific institutions and systems at the transition phase from school to VET or the world of work. Close attention should be given to the nature of the interfaces, which can often cause young people to lose the way as they move from one system to the other.

- *Access and assignments:* Questions of whether target groups have access to counselling and education programmes, and whether their rights of participation are hindered by legal barriers, are particularly important for lifelong learning and for them to earn a living, and thus for their participation in society. Arrangements for contact with support structures need to be arranged for easy movement through various programmes, because they build on one another and are linked with each other.

- *Pedagogical aims – curricula:* Educational concepts have to be designed to take account of the heterogeneity of their target groups and respond to individual education and support needs. Relevant aspects may include not only unconventional learning settings, but also institutionalised support systems which ensure that participants can stay in the programme, the course or the job.

- *Questions concerning the organizational development:* Targeted strategies and action concepts are needed to ensure that justice in opportunities for participation is not restricted to an individual event or project, but is established on a long-term basis. It is important to consider how far all the levels and decision makers within an institution or programme are involved, in order to institutionalise a diversity concept which is externally visible and provides appropriate controlling tools which are effective internally.

- *Networking and cooperation with external groups:* Practical experience over many years has shown that networking to support practical work secures the wide range of skills of the players in the process, and thus improves the results of educational and social work. Cooperation of strategic partners at operating level and interlinking of targeted lobbying at local and regional level and beyond can establish working structures which promote long-term integration of vulnerable groups. Networking helps in transfer of knowledge, and also provides a platform for joint work on politically disputed subjects and fields of activity.

This structure aims to set up a programme where all levels and dimensions can be handled, for reorientation to establish a diversity based concept, profile, and corresponding strategy.

In the different Partner countries the tool has been applied in various institutions of the local VET transition systems. Positive feedback was given, that it is very easy to familiarise users with the tool for monitoring, and to adapt it to the local transition system. It has been qualified as very supportive to strengthen cooperation with other establishments, organisations and initiatives, and to build and improve the skills of process monitoring staff.

The tool makes evident, that vulnerable groups are not homogeneous, they have heterogeneous conditions and problems and different needs. Social relationships (family relationships and other stable social links) have a substantial influence on the course of migration education and working life. This influence can be both positive and negative. Family ties, demonstrate among other things that the economic pressure of making a financial contribution to the family is often the initial trigger for migration and can be the driving force for subsequent onward migration within transnational networks. Family relationships are widespread, and dispersed and are in many cases located in different countries. The tool helps to understand these structures, but it also shows the limitations of the transition system to respond to these challenges.

Limitations of the tool are described as follows: too many questions have to be responded. In the institutions there is not enough time to discuss and answer all the questions in detail. Some users pointed out that transition barriers are supposed to be more complex than it has been considered in the Index, and they are criticising, that the tool is considering more organisations and systems than biographies and individuals. Others mentioned, that is can be somehow frustrating to detect the lack of adequate educational offerings. Nevertheless the tool has been valued as practical, useful and adaptive to get insights of the local transition system from school to world of work and to support the municipalities in initiating and shaping integration processes with active participation of all stakeholders in the community.

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SOCIAL RESPONSIBILITY AND ENVY: MULTICULTURAL REFLECTIONS

Abstract

Multicultural organizations can be central to mitigate organizational situations in which envy could potentially flourish, therefore contributing to fostering organizational conduct that leads to institutional social responsibility. The paper focuses on the inner workings of organizations related to their leaders' understanding of what the expression "social responsibility" means. The article highlights how envy among its members could be tackled in order to boost social responsibility, and promote social justice. The paper analyses institutional leaders' discourses from an enterprise and from a higher education institution (HEI), gleaning their meaning of social responsibility and their perceptions of their role in challenging envy as part of that social responsibility agenda. In order to challenge envy and promote fair conducts and social responsibility, the role of positive multicultural leaders and the strengthening of an organizational collective identity should be emphasized. The findings suggest that organizations need to be better equipped in order to face organizational turbulences detrimental to the social responsibility success, by focusing on cultural diversity and retention of good workforce as part of their social responsibility and social justice remit. The paper discusses social responsibility in a way that goes beyond the hitherto prevalent focus on environmental concerns and corporate accountability. Also, it is relevant comparatively in that it shows aspects to be addressed for the success of social responsibility in international contexts.[1]

Keywords: social responsibility, envy, multicultural organizations, codes of conduct, higher education institutions

Introduction

Organizations have been increasingly faced with challenges in order to be competitive and, at the same time, ensure they are able to develop an institutional climate in which diversity is valued and fair conducts are ensured, so that social responsibility and social justice can underlie its day to day activities.

When doing a critical analysis of previous research concerning social responsibility, the main dimensions that have been discussed in literature tend to focus on environmental concerns and corporate accountability. In that sense, the research problem and the research aim of the present study refer to two interrelated aspects that still seem to beg for further research, namely: the inner workings of organizations related to their leaders' understanding of what "social responsibility" means; and the extent to which envy among its members is understood as a potential deterrent to social responsibility.

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[1] An earlier version of the study in this paper can be seen at the 8th IRDO CD Rom proceedings, Maribor, 2013.

In fact, as expressed by ISO/FDIS 26000 (2010), "the perception and reality of an organization's performance on social responsibility can influence, among other things… its ability to attract and retain workers or members… [as well as] the maintenance of employees' morale, commitment, and productivity" (p. vii). Due to the fact that envy prevents values inherent to social responsibility and social justice such as cooperation, respect for the other, and the valuing of cultural differences, it erodes the organization climate and is therefore a liability for the success of the organization's efforts towards improving its social responsibility.

Based on those considerations, the present paper argues that multicultural leaders can be central to mitigate organizational situations in which envy could potentially flourish, therefore contributing to social responsibility and to social justice. In order to develop the argument, it firstly outlines the theoretical framework that informs the concept of multiculturalism in organizations and links it to a view that social responsibility and social justice are enhanced when multicultural leaders proactively and successfully tackle envy. It then analyses two institutional leaders' discourses – one from an enterprise and one from a higher education institution (HEI), gleaning their meaning of social responsibility and their perceptions of their role in challenging envy as part of ensuring fair conducts leading to the success of a social responsibility agenda.

The paper is relevant comparatively in that it shows aspects to be addressed for the success of social responsibility in international contexts, providing illustrations of the challenges of tackling what Jones *et al*. (2009) call as the tensions between "corporate irresponsibility and corporate social responsibility".

Envy as a conduct against social responsibility

In a globalized scenario, there has been an increased awareness that organizational socially responsible behavior can add not only to its competitive advantage but also to its contribution to a more sustainable world. In fact, a greater ease of mobility and a worldwide responsibility for keeping peace and combating injustices has meant that a growing interdependence is the main idea that underlies the need for social responsibility (SR) worldwide. Authors such as Olson (2006) suggest that building on a holistic, multi-disciplinary approach in management can help maintain maximum levels of flexibility, so as to limit risk in organizational performance. As related to social responsibility, Bozicnik & Mulej (2010) contend that it also should be viewed as a holistic way of thinking, and it should be embedded in an interdisciplinary international creative cooperation dimension. Among the views by which SR has been viewed, those that call for an honest organizational corporate behavior towards co-workers, other stake holders, wider society and humans' natural environment, as well as "a way from human onesidedness to requisite holism, ourselves included" (p. 24) seem to be crucial from the referred authors' perspective. Belayeva & Canen (2011) study on social responsibility in the BRICs countries also support the interdependence approach, by arguing that a socially responsible model should go beyond the limits of philanthropy, calling for effective interaction practices, a planning of joint actions, the development of joint projects and the challenging of "double standards in estimation methods of social responsibility" (p. 568).

As a core document that guides and supports social responsibility, ISO/FDIS 26000 (2010), defines social responsibility as "willingness of an organization to incorporate social and environmental considerations in its decision making" (p. 6). In fact, it highlights that "the ongoing regular daily activities of the organization constitute the most important behaviour to be addressed" (p. 7). It also emphasizes that such a concept is applicable to all organizations, not just business ones, which leads to the understanding of HEIs as crucial sites for the development of that dimension as well.

We argue that much has been starting to be told about social responsibility in broader terms, geared towards more general principles. However, more has to be researched in terms of the organization viewed not as a homogenized, unified or essencialized concept, but rather as an alive, culturally diverse institution in which envy emerges as a serious obstacle to the success of organizational moves towards social responsibility. That way, we contend that a homogenized approach to organizations should be avoided, so that organizations should review their activities and decisions in the light of the real human beings that are part of it, by gleaning the extent to which processes that are against social responsibility operate in its everyday actions. Among such processes, we argue that envy is a central one, which undermines the efforts towards social responsibility.

In fact, as explained by Canen & Canen (2012), envy saps peoples' energy and provokes inner conflicts that may prevent institutional flourishing. It therefore is against the spirit and the success of social responsibility. It is therefore relevant for institutions to focus more on ways by which envy can manifest itself so as to avoid it becoming a destructive force. In a similar vein, Samier & Atkins (2010) suggest that preventing and combating administrative narcissism should be paramount in professional programs. They call the attention to the fact that narcissists will exploit organizational positions in which they are empowered so as to show off their hard working compulsive drives and putting other people down whom they envy for the apparent superior qualities shown in the organization. In contrast to respecting institutional rules, narcissists substitute those for "their own idiosyncratic interpretations which furthers their own agenda, finally at the expense of others" (p. 590), which certainly is against a social responsibility perspective.

Menon & Thompson (2010) suggest that enviers have difficulty in learning from and collaborating with other people. They point out that an institution in which those people have the upper hand may value strangers to the detriment of internal peers, so as not to praise colleagues whom they envy. Canen & Canen (2008, 2012) discuss how a negative institutional climate may deteriorate institutional evaluation results. Also, according to Wobker (2014), envy may result in spiteful behavior, which shows that recognizing its impact may lead to new understandings of inefficient organizations and welfare losses so as to better manage the destructive influence of such an emotion. In fact, as also suggested by Canen & Canen (2012), it seems that envy is likely to be generated when people act in a way that tends to break the *status quo*. In fact, when envious people dominate an organization, they tend to undermine those peers that break the status quo, namely those that bring any innovative developments or creative undertakings that could possibly add new dimensions and bring fresh looks to the organization. Also, when social responsibility is understood in relation to the extent that the regular daily

organizational environment is conducive to respect and dialogues (ISO/FDIS 26000, 2010), it seems to be clear that envious people can undermine efforts towards that dimension.

Therefore, tackling envy at the organizational, managerial level seems to be crucial for innovation, creative thinking, and the ensuing flourishing of the organization and in it social responsibility success.

Multicultural organizations against envy

We contend that in order for organizations to more successfully develop social responsibility and social justice, they should view themselves as "multicultural organizations" (Canen & Canen, 2005), namely those that value fair conducts, cultural diversity, effectively respond to it and build on it for the success of social responsibility. In order to do so, multicultural leaders (Canen & Canen, 2008) are crucial elements in that they promote a nurturing environment in which bullying is firmly challenged, conflicts are competently tackled and all feel valued. Above all, multicultural leaders promote a sense of trust, which results in the fostering of fair conducts and a more robust organizational climate, which arguably reflects in a more socially responsible organization. Differences between multicultural and monocultural leaders have been presented by Canen & Canen (2008), showing the damaging effects brought about by a monocultural leader. As claimed by Jagersma (2007), leaders should seek to develop a corporate aspiration with carefully selected words and messages so that it should cross country and cultural boundaries in a way that reflects the long-term goals and identity of the organization.

Also, it seems to be important that higher education should embed multicultural sensitivities in its courses, so as to foster the preparation of future professionals towards that aim. Progoulaki & Roe (2011) contend that the increase of corporate mergers and takeovers across national boundaries has meant that multicultural teams are more and more frequent. As a result, organizations should arguably deal with cultural issues and cultural diversity in order to be socially responsible. The referred authors also point out the crucial role of leadership skills in order to value cultural diversity and avoid conflicts. They have shown that the way leaders interact with their subordinates and how considerate they are towards cultural differences and issues represents a crucial step towards social responsibility.

The linkage between multicultural organizations and the success of social responsibility can be viewed in the analysis of ISO/FDIS 26000 (2010), albeit in an indirect rather than direct form. In fact, concerning the valuing of organizational diversity, the referred document is eloquent in highlighting a human rights' principle among the seven ones that are deemed central for social responsibility. In that principle, it explicitly states that "an organization should take care to ensure that it does not discriminate against employees, partners and others" (p. 28). Organizational auditing is also addressed in the referred document in terms of suggestions of checklists for self-assessments or reviews that compare performance across social responsibility core principles and subjects, including those related to ethical and humans rights perspectives.

The emphasis on communication between the organizational management and employees, as well as the necessary dialogue throughout the organization and the need for organization's governance, systems and procedures to adopt a social

responsibility perspective in all its levels (as emphasized by ISO/FDIS 26000) can lead to the need for a multicultural framework (Canen & Canen, 2012) to embed organizational climate so as to provide management with strategies that not only mitigate but mainly avoid the effects of envy in the workplace, contributing to enhance management competence, and, we could add, social responsibility. The referred authors point out that a crucial component of such a framework should be the presence of a multicultural leader that builds on trust (Canen & Canen, 2008), and who could enhance the collective construction of mission statements and of an ongoing process of cultural training and cultural auditing (Canen & Canen, 2010), in a nurturing and trustworthy atmosphere. Such an auditing should monitor and assess the extent to which a multicultural perspective embeds the audited organization, beyond the more economically driven indicators normally addressed in more conventional auditing processes. In fact, Belayeva & Canen (2011) propose a model so as to increase social responsibility which comprises partnerships, organizational culture, the creation of uniform standards for organizational monitoring and estimation of social responsibility, also including what they call the development of social auditing processes.

It should be pointed out that the European Commission (2011) document about corporate social responsibility, even though with a somewhat more economically driven tone, also stresses the idea that such a responsibility has to do with respect for gender equity, human rights, integration of disabled persons in its agenda and, last but not least – in trust. In fact, as argued by Zenko & Mulej (2011), "social responsibility demands a great evolutionary step in human mentality, understanding, reasoning and decision making" (p. 1266). Also, Velentzas & Broni (2010) contend that there should be a strong link between corporate social responsibility and managerial ethics. They argue that whereas social responsibility is the need for business corporations to work for social betterment, management ethics should be its cornerstone. Among the ethics dimensions mentioned by the study, the referred authors argue that management should be able to ethically tackle conflicts and discriminations in order to build a positive corporate environment conducive to the enhancement of corporate social responsibility.

We contend such a view could move those organizations the farthest away from what Jones *et al*. (2009) call "corporate irresponsibility" towards a "corporate social responsibility" approach. In that sense, as defended by Samier & Atkins (2010), professional higher education programs should be attentive to prevent and combat administrative narcissism. In order to achieve that, they suggest that a proactive and stronger foundational curriculum should be in place that could better prepare administrators to distinguish problems and adequately cope with them in the organizational behaviour. Likewise, Canen & Canen (2012) study reinforced the role of HEIs in rethinking their curriculum in management education and other related areas so as "to prepare leaders to competently deal with envy; avoid its effects in the organization; and turn it into a multicultural one" (p. 205). In fact, there is a strong connection between being a multicultural organization and tackling envy, due to the fact that such an organization positively accepts cultural diversity, in addition to being prepared to deal with conflicting ideas and values. Such an organization is opposed to others in which envious people tend to silence plurality so as to reinforce

only those ideas that do not seem to pose threats to their malicious organizational hegemony.

As can be noted from the above, it seems that such a linkage between social responsibility and the challenge of envy in a multicultural perspective has not been explicitly found as yet in literature other than the authors' specific studies concerning that area. It that sense, that topic can be considered as the authors' effort towards a substantive contribution to the field.

Leaders' approach to social responsibility and the challenge of envy

The methodological approach of the present study was qualitative in nature, based on oral histories, which consist of in-depth interviews that pinpoint feelings and perceptions concerning research topics as they have been lived by the respondents. The present paper specifically draws on data from oral histories of two people linked to top managerial positions in Brazil, actually being two leaders that were representative of high echelons respectively in an enterprise (interviewee 1) and in a higher education institution (interviewee 2) in Brazil. The main instrument included interviews with both leaders for the data collection.

The criteria for the selection of the respondents were based on their significant roles in the leadership in those two organisations, which have also been chosen due to their relevance and impact in Brazilian educational and economic landscape. Also, it should be noted that both leaders had direct personal contact with the researchers, and were willing to talk about those sensitive topics to the authors. It should be pointed out that data related to the institutions and to the leaders involved in the present research have been kept anonymous for ethical and sensitive reasons.

However, due to their singular position as top leaders in both organizations, it can be inferred that their views and quotees do express the majority view of those that assume leadership roles in those managerial functions.

When asked about the meaning attributed to the expression "social responsibility", the following excerpts illustrate the interviewees' views:

Social responsibility means taking care of individuals, of their religious and ethnic differences, by promoting the decreasing of differences in terms of access to education and to health. It is also linked to the environment, doing our part in the way of preserving natural resources… all of this at the personal level. In terms of the organizational level, it means to take care of the differences, and promote those accesses to education and health through partnerships and sponsorships. (From interviewee 1, December 2012)

In our HEI, our social responsibility is twofold: firstly, it is geared towards the quality of teaching and researching. It has to do with promoting and increasing knowledge. That is the first and paramount aspect, it is what society expects from us, it is our mission. Secondly, there are aspects linked to extension, so that the HEI does not become an ivory tower, and embraces society's afflicting questions. For example, when the HEI promotes training, when it broadens the range of those to be benefited by education, or when a faculty member and their team are called to assess the impacts and the viability of a government undertaken… this is a very important extension role, because the HEI has to

have a political distance and be able to be impartial in its assessment of projects, and that is its big contribution. (From interviewee 2, December 2012)

As can be noted, issues related to differences, as well as to respect to diversity have been mentioned by the interviewee 1. However, a closer look seems to point to a more abstract way of talking about those differences, generally perceived as outside the institutional environment, namely as inherent to those to whom the enterprise projects are geared for. Concerning interviewee 2, HEI social responsibility was understood as both undertaking its role in increasing knowledge and in developing its extension to society, therefore also seeming to focus on the effects of the HEI actions towards its students, future professionals and researchers and to the broader public outside it. Even though those aspects are present in documents and literature dealing with social responsibility (ISO/FDIS 26000, 2010), and undoubtedly represent a crucial dimension in social responsibility, nevertheless they still do not perceive inner multicultural organizational aspects (Canen & Canen, 2005) as relevant to social responsibility.

Although the referred aspects pinpointed in the aforementioned excerpts seemed to give an idea of both the enterprise and the HEI as essencialised, homogenized entities, rather than multicultural ones, it is important to note that those discourses seemed to be nuanced when the interviewees were asked whether they had any perception concerning envy and its impact in the organization search for social responsibility, as well as to how they understood the role of leaders in promoting that idea and challenging envy. The following excerpts illustrate the point:

I don't feel there is envy here… But there has not been always the respect for differences in this enterprise… there was a time in which there was a differentiated managerial culture… those that had been here for a long time started to get relegated, devalued, and others that came from the company A literally "invaded" it… The feeling we had at that time was not properly of envy, but rather of having suffered a tremendous injustice… The leader at that time was issued from that company A, and that leader was not really concerned in valuing differences… (From interviewee 1, December 2012)

Yes, there is envy. It is very common to note peers undermining their colleagues' reputation due to envy. Maybe it has to do with a cultural formation of our people, in which competition is not well viewed as opposed to some international societies in which the competition moves people even to become better people, because they even compete against their own selves in terms of getting to be better and better. The competition there fosters work, quality and positive values!… Here there apparently is no competition, but there is envy, it certainly permeates the HEI… There also is narcissism… which has everything to do with envy… The moment someone says they are better than the others, and they try to topple the others down, they are undermining their peers… It also has to do with our culture, because whilst in other international contexts the critiques are well accepted, here they tend to be taken as personal offense, people get angry, particularly narcissist ones… Undoubtedly, envy can damage social responsibility, because if, say, someone is doing a work that may have positive impact, the envious person can make up something and denigrate both

the person and the work being done, not at all moved by a sincere will to critique, but rather by sheer envy… (From interviewee 2, December 2012)

Discussion

As can be gleaned from the above, interviewees 1 and 2 had different discourses concerning the presence of envy in their organizations. It should be noted that even though assuring that there is no envy in the enterprise, nevertheless interviewee 1 has indirectly touched on issues of discrimination against workforce, as opposed to a social responsibility perspective (ISO/FDIS 26000, 2010), as well as on the deleterious role of monocultural leaders as opposed to multicultural ones. The leader mentioned by the interviewee 1 seemed to be a monocultural one (Canen & Canen, 2008), likely imbued by ideological and narcissist predispositions (Samier & Atkins, 2010). Interviewee 2, on the other hand, clearly assumed envy was a component of everyday life of the HEI. He seemed to perceive the deleterious role of envy for an institutional road towards social responsibility, as well as that of the presence of narcissism (Samier & Atkins, 2010). Both discourses, however different in content, clearly seemed to indicate that the enterprise as well as the HEI are likely far from approaching social responsibility as a holistic, interdependent oriented organizational thinking (Bozicnik & Mulej, 2010; Belayeva & Canen, 2011). Also, they seem to be far from perceiving their roles in nurturing an open and multiculturally oriented approach to management that potentially could minimize envy and discrimination at the work place (Canen & Canen, 2012).

As a way forward, the interviewees presented some aspects that were deemed efficient to deter envy and optimize fair conducts and social responsibility, as can be noted below:

The company does not foster incentives and differences. It is a fair enterprise, in terms of social ascension, salaries and so forth. All the positions are published, the promotions are based on the recommendations of organizational committees, the actions are all transparent… There is a Code of Ethics, approved by the Administrative Board, with established rules for human relations. (From the interviewee 1, December 2012)

Today there is not an enhanced collective spirit… there is a high rate of individualism and the quantitative indicators of performance only make it worse… It is important to face those challenges, to leave our comfort zone, to start and carry out other kinds of audits so that we can rebuild a collective department identity, which is an efficient way of promoting a collective spirit that is good to minimize envy. (From the interviewee 2, December 2012)

As can be noted, interviewee 1 stressed that making promotions and human relations more transparent and instill a trustworthy environment was a crucial aspect undertaken by the enterprise which was perceived as a potential deterrent to envy and narcissism. Interviewee 2 suggested that creating a collective identity and fostering assessment criteria and mechanisms that could enhance cooperation in the place of individualism could likely improve institutional climate, as suggested by authors such as Canen & Canen (2012), and Samier & Atkins (2010).

Both interviewees further elaborated on the relevance of a positive leadership (Canen & Canen, 2008) and of a nurturing organizational climate towards mitigating discrimination, envy, and promoting social responsibilitiy and fair conducts. In fact, interviewee 1 called the attention to a time when there was a CEO of the company that managed to instill an organizational mission in which competition and envy were perceived as being absent, because of the predominance of values of cooperation. Even though the change in leadership for some years ahead rather undermined that vision, by promoting a negative institutional climate as mentioned earlier, the interviewee 1 conceded that those values seemed to linger at the present time, that turbulence having been apparently taken control of.

Likewise, interviewee 2 also talked about the need for organizations to control what he called "the cultural trait of envy, which is corrosive and endemic to our culture". Even though not explicitly mentioning the presence of a multicultural leader, rather attributing a positive institutional climate to the department smaller size at a certain time in the past, it seems that such a leadership had some important weight in the construction of the department "collective identity". In fact, according to the interviewee 2, such an identity had been carefully built through seminars, everyday encounters and other initiatives at that time. In that sense, interviewee 2 also brought to mind an expression that permeated institutional climate at that time, namely "Department X man/woman". According to interviewee 2, such an expression revealed an identity of those that worked there, and likely represented a deterrent to envy "since all felt valued and identified under that expression... indeed there was a 'body spirit' that united all, people interacted and identified as one collective body" (from the interviewee 2, December 2012).

In that sense, it is worth noting at this point that both interviewees pointed to the importance of instituted organizational mechanisms that could foster a collective identity that could potentially work towards promoting fair conducts and the success of social responsibility (ISO/FDIS 26000, 2010; Bozicnik & Mulej, 2010; and Belayeva & Canen, 2011). Their discourses indicated the relevance of institutional mechanisms that could lead organizations from negative to positive ones, so as to avoid those aspects such as envy that are a liability to fair conducts and social responsibility. Those mechanisms are arguably deemed relevant so that the organizations should move from corporate irresponsibility to corporate responsibility (Jones *et al*., 2009), and become multicultural organizations (Canen & Canen, 2005), equipped to positively face diversity and promote fair conducts and social responsibility.

Conclusions

The present paper has focused on the inner workings of organizations related to their leaders' understanding of what the expression "social responsibility" means, and the extent to which envy among their members is understood as a potential deterrent not only to fair conducts but to social justice and to social responsibility as well. Its main argument was that multicultural organizations can be central to mitigate organizational situations in which envy could potentially flourish.

By analysing the discourses of two organizational leaders, respectively acting in an enterprise (interviewee 1) and in a HEI (interviewee 2) located in Brazil, some reflections can be drawn. Firstly, even though some elements of social responsibility

mainly geared towards environment and local communities were predominant in their understanding of the meaning of social responsibility, at the other hand there seemed to be an implicit (rather than explicit) concern with social responsibility in terms of the organizational institutional approach, particularly perceived when situations involving envy, narcissism and discrimination were felt by them. A positive multicultural leader and, most of all, a collective identity engendered by that leadership that could involve all in a clear, trustworthy atmosphere and provide a common sense of direction were some of the ways ahead suggested by them in order to challenge envy and promote fair conducts and social responsibility.

In that sense, we claim that organizations need to be better equipped in order to face organizational turbulences detrimental to the social responsibility success, by focusing on human rights and retention of good workforce as part of their social responsibility remit. That way, such a dimension should arguably be more explicitly taken into account in the organizational statements and cultures, so that they could develop into real multicultural organizations well equipped to foster fair conducts and social responsibility.

The present paper arguably represents an original avenue, in that the interconnection of envy and social responsibility is unlikely to have been addressed in literature as yet, being part of the authors' main research interests. It is an exploratory study, intended as a call so as to raise future collaboration for further research and discussions related to meanings attributed to social responsibility. It is expected that future joint works and partnerships could facilitate the incorporation of multiculturally oriented policies and practices that contribute to mitigate envy, value cultural diversity, and therefore promote an ever increasing worldwide successful social responsibility.

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EDUCATION OF STUDENTS WITH SPECIAL EDUCATIONAL NEEDS AND THEIR INCLUSION IN THE COMMUNITY

Abstract

In education, inclusion is a process of mutual respect for differences of every student and his/her needs, in which the focus is placed on the student. The education system, on the other hand, should deal with the challenges that all students face, including the special educational needs students. The main purpose of this paper is to investigate the role of educational inclusion of students with special educational needs in mainstream school system and to offer strategies or more precisely guidelines for teachers working with them. Research and practice in special education and inclusion of students with disabilities in the mainstream school system and social life are one of the most important priorities of Policy of the Department of Education and Science in every country in the world. So in this paper we have presented attitudes and experiences about special education reforms strategies in educational system. Research methods are based on documents studies and cases studies about changes in social and educational policies for students with disabilities and special educational needs who are included in primary and secondary school. Conclusions are that students with disabilities and special needs should enjoy the same access as their non-disabled peers. There is growing evidence that students with disabilities learn better when they are allowed to go to a public school within their neighborhood. In this frame, school societies try to support full participation of students with disabilities in areas of their lives on equal terms, conditions, social justice and basic human rights.

Key words: disabilities, special educational needs, integration, inclusion, peers

Introduction

The last twenty years have been unprecedented time for parents and professionals who work with children with special needs. We have benefited from more effective special needs as well as from a trend towards more inclusive and normalized educational experiences for all children with disabilities (Roussos, 2003). As a society we have had more opportunities to learn from students with disabilities and from parents of children with disabilities. Researchers have learned more about effective interventions and children with special needs are being included in child care, recreational and educational programs more frequently.

But through the world, students with disabilities and many others who experience difficulties in learning are often marginalized within or, indeed, even sometimes excluded from school systems. Children and adolescents with disabilities ace inequalities in health care, transport, education, employment and other aspect of human life. A great number of these children live in developing countries where they often suffer neglect, stigma and discrimination (Barbette, Guillemin & Chua,

2001). The situation began to change only when legislation started to require including children with special needs in educational system.

Ensuring that children with disabilities receive good quality education in an inclusive environment should be a priority of all countries. The United Nations Convention on the Rights of Persons with Disabilities recognizes the right of all children with disabilities both to be included in general education system and to receive the individual support they require (Convention on the Rights of Persons with Disabilities, 2006).

For children with disabilities, as for all children, education is vital in itself, but also instrumented for participating in employment and other areas of social activity. In some cultures, attending school is part of becoming a complete person. Social relations can change the states of people with disabilities in society and affirm their rights (Nott, 2008). For children who are not disabled, contact with children with a disability in an inclusive setting, over the longer term, increase familiarity and reduce prejudice.

So the main purpose of this paper is to investigate the role of educational inclusion of students with special educational needs in mainstream school system and to offer strategies or more precisely guidelines for teachers working with them.

The means of the term disability

The World Health Organization has defined health as "a complete physical, mental and social well-being and merely the absence of disease or infirmity". The concept has been more recently extended to include health related with quality in life. According to the international classification of impairments, disabilities and handicap, impairment is concerned with physical aspects of health, disability has to do with the loss of functional capacity resulting from impaired organ and handicap is a measure of the social and cultural consequences of an impairment of disability (World Health Organization, 2011). Disability affects physical health, social relationship of people, life in the context of family, friends and neighbors, psychological sate and level of independence. The consequences of disability can have an impact at personal, interpersonal, family and social levels. Disability affects the different facets of life of a person and this life is often complicated by negative forces, such as ignorance, prejudice, negativism and insensitivity.

Many disabilities with a clear medical basis are recognized by the child's physician or parents soon after birth or during the preschool years. In contrast the majority of students with disabilities are initially referred for evaluation by their classroom teacher or parents, because of severe and chronic achievement or behavioral problems (Carroll & Florin, 2003).

These disability categories are based to varying degrees on eight dimensions of behavior ability: intelligence, achievement, adaptive behavior, social behavior and emotional adjustment communication, language, sensory status, motor skills and health status.

What are "special educational needs"?

Some children find it harder to learn than other children of the same age. Children who are finding learning difficult are supported by their teachers, or with

some extra help in school. A few children have more complicated learning difficulties and may need extra help or equipment in school to help them access an appropriate education.

Research and practice in special education show that students have special educational needs if they have a learning difficulty which calls for special educational provision to be made for them. About one in five children may have special educational needs of some kind. Some children may have special educational needs for relatively short time; others have special educational needs right through their education.

So special educational needs means, in relation to a person, a restriction in the capacity of the person to participate in and benefit from education on account of an enduring physical, sensory, mental health or learning disability, or any other condition which results in a person learning differently from a person without that condition (Smith, 2010).

Most of the children with special educational needs will have appropriate provision made for them by their school, working with parents. Sometimes the special educational needs (SEN) team may become involved in helping the school to provide the support needed (Farwell, et al., 2007). All professionals and parents realize that students with disabilities are human beings with a wide range of assets and limitations. Students with disabilities are different from the normal in one or two personal dimensions such as intelligence or achievement. The evaluation typically includes observation in the regular classroom, review of the child's educational history including past test scores, assessment with standardized tests of achievement if there are discrepancies between achievement and intellectual ability, and elimination of other possible causes of the learning problem (for example, sensory or visual deficits).

Educating students with special needs

Special Education is a specialized area of education which uses unique instructional methods, materials, learning aids and equipment to meet the educational needs of students with disabilities. Special services designed instruction that meets the unique needs of a child who has a disability. These services are provided by the public school system and include instruction in the classroom, at home, in hospitals and institutions.

Special education instructors work with youth and students with a wide range of disabilities. A small percentage of these special education teachers work will students with mental retardation or autism and primarily teach them life skills or basic competency. The majority of special education teachers work with students with mild to moderate learning disabilities. They use the general education curriculum and modify if to meet each child's individual needs. Most special education instruction teaches students at the elementary, middle, secondary and high levels (Hustler & Levi, 2008). Special education program provide instruction for specific learning difficulties and disabilities, such as speech and language impairments, emotional disturbances, hearing and visual impairments. Students are tested and listed under of one of the categories and paired with teachers are prepared to work. One of the most critical steps in aiding students with disabilities is early

detection and intervention and most of the special education teachers are well qualified to aid the students in overcoming their disabilities.

Special education teachers use various techniques to promote learning. Depending on the disability, teaching methods can include individual instruction, problem-solving assignments and small group work.

Special education makes for student to achieve academic success in the least restrictive environment despite their disability. So special education teachers help to develop an Individual Education Program (IEP) for each special education student. The IEP sets personalized goals for each student and is tailored to the student's individual needs and ability. Teachers work closely with parents to inform them of their student's behavioral, social and academic development, helping the students develop emotionally, feel comfortable in social situation and be aware of socially acceptable behavior (Coleman, 2005). Special education teachers communicate and work together with parents, social workers, school psychologists, speech therapists, occupational and physical therapists (Oyez, Hall & Haas, 1987).

Benefits of inclusive education

Over the past years inclusion has become increasingly the focus of many national and international policies of education. Many children with disabilities have become victim to an educational system which is not able to meet their individuals' needs. Inclusive education is a human rights issue. Inclusive education means that all children, regardless of their strength or weaknesses are accommodated in a school and become part of the school community. Inclusive education encourages bringing all students together in one classroom and following the same curriculum regardless of their diversities. The literature suggests that special needs students who have been educated in regular classes do better academically and socially than comparable students in non-inclusive settings (Karen, 2009). Also students with disabilities who were educated in inclusive settings made significantly greater progress in math than their non-disabled peers (Martin, 1995). Students without disabilities can serve as positive speech and behavior role models and offer acceptance, tolerances, patience and friendships.

The benefits of inclusive education are numerous for students with special educational needs. For example some of them are:

- Warm and caring friendships
- Increased social initiations, relationships and networks
- Greater access to general curriculum
- Increased inclusion in future environments
- Improvements in self-concept
- Development of personal principles
- Greater opportunities for interactions.

The inclusive education should play a key role to ensure individual development and social inclusion, enabling children and youth with disabilities to attain the highest possible degree of autonomy and independence. In this frame, school societies try to support full participation of students with disabilities in all areas of their lives on equal terms and conditions (Bowers, 2004).

Organization of education for SEN students in the Republic of Macedonia

The tendency in most European Union countries is to develop policies that promote inclusion as an important process in democratic societies, which gives equal opportunities to everyone and maximum flexibility in meeting the specific and social need of the individuals. Having in mind that inclusion is a developing and dynamic process, the developmental level of inclusion in the member states varies. Following the global tendencies and practices, the South-East Balkan countries, including the Republic of Macedonia, face a challenge to steer the national policies towards creating societies that are structurally based on the principle of equal rights to all, according to which person has equal right and opportunities, individual differences and respects and hey lead towards building an inclusive society. The general intentions of the Macedonian institutions are to build an inclusive society in terms of abilities, ethnicity and socio-economic inclusion. Progress has been made, although inclusion is a multi-causal conditional process which requires the involvement of resources and time for full institutionalization and strengthening inclusive culture, policies and practices.

Inclusiveness in the education system in the Republic of Macedonia, as well as in the South-East European countries is a relatively new concept. In 2001, the Government of the Republic of Macedonia adopted the National Strategy on Equalization on the Rights of Persons with Disabilities in the Republic of Macedonia, which is based on a through comprehension and analysis of the need the Government to adopt adequate decisions for protection, education, rehabilitation, training and employment of disabled persons. The National Strategy on standardization of the rights of persons with special educational needs was revised 2010-2018. It represents a plan for numerous activities of their disabilities in all areas of life (National Council of Disability Organizations of Macedonia, 2011). The right to education for the persons with disabilities is covered by Article 24 of the Convention on the Rights of Persons with Disabilities, which our country ratified in 2011.

In Macedonia, the current concept of education and training for special educational needs students is regulated and integrated in the Law on Primary Education, the Law on Secondary Education and the Law on Educational Inspection as well as other strategic documents and is based on the highest legal act, the Constitution of the Republic of Macedonia.

In the Constitution of the Republic of Macedonia, the part on economic, social and cultural rights also regulates the right of education, which states:

"Everyone has the right to education. Education is accessible to everyone under equal conditions".

The education and training of SEN students in the Republic of Macedonia is organized in special institution and schools, in special classes within regular schools and in "regular classes" together with their peers.

The Law on Primary Education gives the opportunity to SEN students to attend regular classes. SEN students who attend regular primary classes enroll in regular secondary schools after completing their primary education. Thus, the number of special educational needs students in the regular secondary schools grows every day (Ministry of Education and Science, 2014).

Identifying the special needs of every child, the additional educational and health and social support should be considered part of the process of ensuring that children and young adults are part of the education system and are able to realize their full potential. So it is fact that inclusive education produces students who will be the future citizens of the country and who will be the overall social developments, changes and values.

Conclusion

Students with disabilities are less likely than students without disabilities to start school and have lower rates of staying and being promoted in school. These students should have equal access to quality education, because this is real way to human capital formation and their participation in social and economic life.

While students with disabilities have historically been educated in separate special schools, inclusive mainstream schools provide a cost-effective way toward. Inclusive education is better able to reach the majority and avoids isolating students with disabilities from their families and communities (Ogot, McKenzie & Dube, 2008).

A range of barriers within education policies, systems and services limit disabled children's mainstream educational opportunities. Systemic and school-level change to remove physical and attitudinal barriers and provide reasonable accommodation and support services are requires to ensuring that students with special needs have equal access to education.

Every child has a fundamental right to education and must be given the opportunity to achieve and mountain an acceptable level of learning. Every child has unique characteristics, interests, abilities and learning needs, so educational system should be designed and educational programmers implemented to take into account the wide diversity of these characteristics and needs.

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CHILDREN VOICES IN RESEARCH

Abstract

The perspective of 'children as social actors' has created a field with new ethical dilemmas and responsibilities for researchers within the social study of childhood. According to experiences of conducting ethnographic video studies in mixed age kindergarten groups, this paper reflects on the processes of negotiating initial and ongoing consent, problematizes the notion of 'informed' consent in exploratory research with young children, and considers questions of anonymity when collecting and reporting on visual data. The paper proposes that by adopting a flexible, reflective stance, researchers can learn much from children about their perspectives and the inclusion of young children in the research process.

Key words: research with children, ethics, consent

Introduction

The changed perspective on children brought by contemporary scientific knowledge on child development and the possibilities of their early childhood education is called a new paradigm by many scientists. Miljak (1996) states that the new paradigm of early education replaces the old, frequently called average practical kindergarten tradition. The outlook on the context of development and education changes, and the question of creating an optimal environment for learning, care and education in institutional conditions arises. The increase of institutionalization of childhood is characteristic of postmodern societies, which are regarded as open, individualized, critical, responsible and free of rigid theories and social systems, but at the same time are associated with the need for an efficient workforce. Dahlberg and Moss (2006) observe the institutionalized development of early childhood education in the context of changed social and economical family conditions. Younger children are enrolled in nurseries and kindergarten, and the period of their stay in institutions is prolonged therefore there is a greater need for monitoring the quality of preschool education. Qvortrup (1986) notices that psychology and pedagogy are becoming more oriented towards observing children at the micro and meso level, dealing with specific problems or specific groups of children. Opposite to them, sociology, history and anthropology try to approach the problem at the macro level by examining the basic childhood conditions in the past and present. They particularly insist on a comparative research of childhood and growing up conditions. Prout and James (1997, p. 8) list several key elements for understanding the "new paradigm in childhood sociology": "a) social relationships are worthy of study, regardless of the perspective and concerns of adults; b) childhood is a social construction, neither a natural nor universal feature of human groups; c) childhood is a historical and cross-cultural variable and it cannot be separated from other variables such as class, gender, or ethnicity; d) children are, and must be seen as active participants in the construction and determination of their own social lives,

the lives of those around them and of the societies in which they live; e) qualitative methods are the most appropriate way of investigating children and childhood".

When observing the social competence of children Hutchby and Moran-Ellis (2005) state that empirical research should be based on the idea of children as competent social actors, which requires the researches to set the study in empirical conditions of a child's real, ordinary, everyday life. However, these empirical circumstances, or "arenas of action" as they call them, can be both enabling and constraining in terms of a child's capacity to display social competencies. Further on, in order to adequately understand the properties of a child's social competence in the "arenas" in which it is situated, it is necessary to attempt to view the relevant social action 'from within', to reveal the procedures by which the participants themselves organize and make sense of their activities in a given social context.

Pedagogic researches of early and preschool education in Croatia in the last fifteen years are based on the qualitative paradigm, starting from the latest scientific findings about children, early childhood education in family and institutional environments (Maleš, 2011). Researchers determine for qualitative participatory research (especially action and ethnographic research), carried out in natural environments, directly immersed into the context.

Research involving young children used to be largely conducted in psychology and contributed to the discourse of the universal and psychological child. Johansson (2011) states that the cognitive child has been (and still is) considered as an object of research whose development is described through "linear and universal stages" (Berthelsen, 2009 according to Johansson, 2011). Ontology, epistemology and methodology within this tradition have been criticized for ignoring the child's perspective and neglecting children as persons and participants of their own lives and culture (Greene, 1998). More recently, a new discourse which sees children as social actors with all their autonomous rights has appeared. They are the co-constructors of knowledge, identity and culture, and childhood is becoming accepted as a socially constructed context. Johansson (2011), exploring the position of children in studies, points out that in political and educational contexts, as well as in practice, we can find a frequent tendency of referring to a "child's perspective" (Halldén, 2003 according to Johansson, 2013). Sociologists, psychologists and pedagogues stress the importance of a child's perspective, as well as the United Nation's Convention on the Rights of the Child (1989), which emphasizes the participatory rights of children. There is a growing interest in acquiring knowledge about the lives of young children and their learning in educational institutions. While previous childhood research concepts were based mainly on the concept of childhood from the adult's point of view, new approaches turn to the real relationship between adults and children. By using new theoretical and methodological tools, researchers are now able to go beyond testing assumptions on how differences in the environment can predict group differences or identifying some of the characteristics, but instead they can observe the dynamics and the transactions between a child and the environment, argues Edwards et al. (2006), which is especially important when observing the social interaction of children in mixed age groups.

The United Nation's Convention on the Rights of the Child (1989)[1] is the first international document in which the child is viewed as an equal citizen with rights, and not just as a person in need of special protection and care. The Convention[2] primarily reminds the adults of the obligations to children as well as the obligations of numerous social factors concerning the protection of the child. In contrast to the Declaration of the Rights of the Child (1959) which, as a moral force, has laid down the path to a better understanding of children and childhood, the Convention on the Rights of the Child is a document which legally binds the parties to comply with its provisions and includes the right to monitor the implementation in countries which have accepted and ratified it. This document has given a voice to children, it is widely represented in international initiatives that have in various ways operationalized the requirements placed upon them having signed this document. The Republic of Croatia, as one of the signatories to the Convention, through the Government's advisory body – the Council for Children, whose task is to promote and protect children's rights in accordance with the Convention on the Rights of the Child, drafted in 2003 the Ethical Code for Research with Children, based on international legislation. The Code seeks to regulate the status of children participating in "humanities, social, educational, medical and all other studies that can directly or indirectly influence the integrity of the child as a whole person" (Ethical Code, 2003, p. 9), as well as the status of the parent/guardian and researcher. The idea behind this Code is not to understand and regulate the ethical conduct with children as a fixed, unchangeable frame but on the contrary as "ethical standards which require continuous reviewing and improvement". All researchers working with children must have a lifelong ethical conduct, and encourage colleagues, associates, students, employers and all with whom they come in professional contact on behaving ethically and to continuously discuss about ethical issues" (Ethical Code, 2003, p. 14). Marković (2008) however notes that the Code is in its making limited by numerous notions which are not unique to it, but arise equally from daily, political and academic understanding of children and "their integrity as whole persons". Johansson (2011) believes that it is very simple to identify the contradictions if the researchers pay attention and examine whose "voice" is truly heard, and whose voice is neglected in research. Kjørholt (2011) according to Johansson (2011) argues that the voices of children are always part of the adult's discourse. The voices of young children are also voices of different interests, conflicts, values and political preferences. Johansson (2011) further quotes Kjørholt (2011), who predicts a danger if the children's voices discourse turns into a hegemony of power and becomes a political and ideological strategy in research.

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[1] The United Nation's Convention on the Rights of the Child was adopted on the 20th November 1989, and it is the strongest type of international agreement. It is widely supported, ratified by 192 countries, thus promising the enforcement of its laws, policies and practices, as well as regular reporting to the UN in regard to the progress of child's rights. The Republic of Croatia is also a signatory to this treaty.

[2] Here in after the abbreviation "Convention" will be used for the "United Nation's Convention on the Rights of the Child".

Question of consent

Ethical research entails a respect for privacy and trust, as well as written consent or refusal (Christensen & James, 2000), which adds up to the question of the participant's age. Lansdown (2005) reminds us that all children who can express their viewpoint, including early age and preschool children, have the right to decide whether or not they wish to participate in a research, and it is therefore necessary to place an imperative on the research with children under 8 years of age, and how to conduct them. The Ethical Code for Research with Children (2003) in Croatia resolved this question of consent and age in a way that parents/guardians give a written or oral consent for the child's participation in the study, however it is interesting that the Code states that "the purpose and the method of conducting the research must be explained to a child older than 7 years of age and below the age of 14 in accordance with his maturity" (Ethical Code, 2003). The question arises, why does not the purpose and the method of conducting the research have to be explained to children under 7 years of age, in accordance with their capabilities of course, as we consider children as full members of society regardless of their age? Penn (2008, p. 141) also asks the question "when are children old enough to be competent to consent?" Further on, Penn (2008) states that even though children off all ages can understand and give consent to research, much depends on each child's experience and confidence, the type of research, and the skills with which the researcher talks with children and helps them not to feel any pressure. "Children aged 3 years upwards have willingly taken part in research, not only as subjects but also as researchers" (Penn, 2008, p. 141).

However, researchers can find themselves in situations where they need to respect the children if they refuse or want to quit or withdraw from the study. Skånfors (2009) talks about these situations which can put the researcher in ethical dilemmas concerning the resistance to participation in the study. Skånfors (2009) claims that children can explicitly tell the researcher to leave, refuse to answer questions, pull away or show their displeasure by ignoring his presence. In these situations the researcher should withdraw and take note, but at the same time remain sensitive to the child's actions and reactions towards the researcher. This child's reaction does not necessarily mean the withdrawal of the child from the research, but can mean a temporary rejection to participate in the research process. The before mentioned should be a basis for reflecting on "ethical sensitivity" or "ethical radars" for research with children, considering that it requires from the researcher to carefully observe the children's actions and understanding, not just in terms of the collection of data, but also in the context of the impact of the research process on their worlds, rather than just relying on children's verbal acceptance or consent given by parents (Skånfors, 2009, p. 16).

Childhood studies were given additional incentive by the UN's Convention on the Rights of the Child (1989), which proclaimed children as the citizens of the world with all their rights, the right for protection, participation and general well-being, which lead to an "explosion" in child and childhood studies. Penn (2008) notes that from the mid 1980's, the interest for children and childhood has rapidly increased. Corsaro (2011) agrees and adds that the increased number of studies has had a positive contribution to raising the quality of institutional education. Children and childhood have been studied within a wide range of disciplines linked to the

social humanistic rather than the natural sciences, which include sociology, pedagogy, media culture, anthropology, history, law, literature, geography, economy, philosophy... Once again the concepts of the child, childhood and adulthood and their relationship to one another, views about values, rights and ethic relations to children are being rethought. Also, the methods of collecting and analyzing data concerning children have been subjected to careful observation within various disciplines (Penn, 2008), and we believe that they still are. For Woodhead (2012, p. 47) interdisciplinary childhood studies represent "a meeting point for different perspectives on early childhood".

Methodology

This paper will present some of the ethical questions which have appeared during the ethnographic research of social interactions of children in mixed age kindergarten groups (children between 2 and 6 years old).

The aim of this research was to gain insight into the nature of social interaction of children, their social status and social competencies in a cross-peer preschool group as the context within which children are socialized. The study used a range of methods including different methods and techniques of field work and of ethnographic work (observation, interviews, video recordings of the children and preschool teachers) in order to gain full insight into the totality of the environment of one preschool education group within which the social interaction of children of different ages takes place. When discussing ethics in research with children, just by choosing the methodology, data collection and data analysis we have come across a variety of ethical issues and dilemmas. Cohen et al. (2007) state that a researcher will often discover that in most studies marked as qualitative or interpretative, methodological and ethical questions are tightly intertwined.

Ethical considerations

At the beginning of the research we needed to obtain consent. The researcher talked to the principal, pedagogues and kindergarten teachers where the research would be conducted and explained the aim, methodology and the course of the research. Through these discussions, she obtained insight into what the adults, as 'gatekeepers' to the institution expected and required of her. Having obtained the institution's consent, a parents meeting was arranged in which the parents met the researcher. She explained to them the aim and the course of the research, the data collection methods as well as the responsibilities of the researcher. In accordance with the Ethical Code for Research with Children, the parents were given a written consent form explaining that the personal information of all participants will be fully protected and anonymous, that the results will be used only for research purposes, and that the participants have the right to withdraw from the research at any moment. The parents gave a written consent allowing their child to participate in the study. It seemed that the research could finally begin, however, one parent withdrew his consent on the first day. The question arose whether we should talk to the parents once again and try to determine the reasons for withdrawal. Would that be ethical? With the help of the kindergarten teachers who are in contact with the parents on a daily basis, it was decided that the researcher will not contact the

parents again because it might create unwanted tensions between the teachers and parents, therefore the reasons for withdrawal remained unknown to the researcher. This situation significantly complicated the research because whenever the child in question entered the movie frame, the video footage could no longer be used. Considering that other children mentioned the child as a friend and playmate, the question arose how to use this data while protecting the child without consent? What to do if the child without consent wishes to participate in the research?

The child's consent is as important as parental consent. According to the Ethical Code for Research with Children parents/guardians give a written or oral consent for children under 14 years of age, however the purpose and the method of conducting the research have to be explained to children over 7 years of age. If it is necessary to explain the purpose, is it also necessary to ask for their consent? What to do in a research with children between 3 and 7 years of age? Since the study's theoretical framework lies within the new sociology of childhood, which emphasizes that children are not passive objects but rather competent and active agents, it was decided that the purpose and method of conducting the research will be explained to the children in accordance with their maturity but also that their consent will be asked. Viewing children as having agency means viewing children as capable of reflecting upon and making decisions about things that concern them, and recognizing that their actions have consequences (Mayall, 2002). Alderson and Montgomery (1996) claim that children can participate in decision-making at four levels: 1. Being informed; 2. Expressing a view; 3. Influencing the decision-making; 4. Being the main decider.

Children generally gave their consent verbally or non-verbally, mostly taking an interest in the technology used during the research (video camera, photo camera, voice recorder). When the research began there were situations when a child turned his back to the researcher making it clear that he did not wish to be filmed, or said that they did not want to talk at that moment, which was respected. However, there were also situations when the child without consent wanted to participate in the interview along with his peers and wanted to see the footage in which he interacted with them. How to balance between the parents' decision and the child's wish to participate in the research? What consequences can the separation of the child from his peer group for the protection of his identity have on the child? Do social relationships within the group and the social status of the child fall apart?

Conclusion

The major barriers to children's voices being heard in research can be overcome by understanding that children can participate in meaningful ways if they feel safe, supported and valued in the research environment. The research environment must be seen through the child's eyes. Strategies that support not only children's abilities but also the social structure in which they live, must be adopted. According to what Skanfors (2009) concludes we agree that merely following the research-ethical principles does not seem to be enough; having an 'ethical radar' is also important in research with children. Every research is unique and poses new ethical questions and dilemmas which will improve the status of children in research and the obligation to respect their rights.

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THE INTERACTION BETWEEN HIGHER EDUCATION AND LABOUR MARKET IN CHANGING ECONOMIC ENVIRONMENT

Abstract

This paper explores challenges higher education institutions face while ensuring one of the quality assurance criteria – meeting the demands of labour market. The relationship between labour market and higher education institutions becomes even more complicated during the periods of rapid changes in labour market caused by economic collisions. In this article statistical data on employment and higher education is analysed and compared with employers' position expressed in interviews. As a result it is considered that students/potential employees remain the main driving force that brings the demands of labour market into higher education.

Key words: higher education, labour market, employability

Introduction

Meeting the demands of labour market has become an important criterion in the process of quality assurance of higher education institutions and study programmes. Considering higher education as a part of social life demanding significant funding – both public and private – concerns about practicality, usability of study results are obvious.

Development of high technologies and the emergence of knowledge society led to higher standards in the labour market as the employers in need of qualified employees were searching for people with higher education (OECD, 2001). Previous research (Hansson, 2007) has established that a better education and wider competencies of the working population ends up generating more economic activity and entrepreneurship and – consequently – more job opportunities for everybody. It is also well known, that in most developed countries unemployment is lower among people with higher education (OECD, 2015). At the same time debate has continued, whether the higher education systems are capable of meeting the demands of modern, dynamic labour market (Little & Arthur, 2010; Jacob & Weiss, 2010; Smirnov, 2008). During economic collisions and rapid changes in labour market, higher education systems are expected to cater to new demands, despite being affected by these collisions themselves.

The aim of the current research is to determine how higher education and the labour market interact during periods of changes caused by economic collisions, and what the driving forces of this interaction are.

Theoretical background

The research on the interaction between higher education and the labour market usually is focused on graduates' chances to get a job, i.e. the problem is analysed from the perspective of the universities. For example, aspects considered to be significant in this context include the socio-economic background of the student

(Argentin & Triventi, 2011; Orkodashvili, 2011), the choice of the "right" higher education institution, or study area (Berggren, 2010, 2011; Lombardo & Pasarelli, 2011), as well as finding the right balance between the general and specific skills and competencies in the learning outcomes (Jackson, 2008; Pukelis & Pileicikiene, 2007).

In line with Bologna process focused on the employability of graduates the importance of generic skills has been stressed. The European Qualifications framework considers them as the descriptors of the learning outcomes of each cycle of education, thus they have become important quality indicators in the higher education quality assessment. However, some research results argue that the role of generic skills might be overvalued (Mason, Williams & Cranmer, 2009; Hejke & Meng, 2011): professional skills and work experience are more appreciated by employers as they curtail both time and resources allotted to the training of a new employee. This increases the importance of collaboration between a higher education institution and concrete employers of its graduates. In European Union a University-Business Forum annually brings together higher education institutions, companies, business associations, intermediaries and public authorities since 2008. The Forum points out that building and maintaining long-term strategic partnerships between higher education and labour market is a time-consuming process (Forum, 2011).

Methods

Two arrays of statistic data covering the period from 1990 till 2010 were analysed and compared. The Latvian Central Statistics Bureau databases were used to extract data on the labour market – rates of employment and unemployment in different sectors, especially those requiring higher education (such as medicine, education, banking and finance). Data on number of higher education institutions, enrolment rates, amount of graduates in specific fields corresponding to the sectors of labour market and some information on graduates' unemployment rates were found in the statistical annual reports on higher education prepared by the Department of Higher Education of the Ministry of Education and Sciences of the Republic of Latvia. Additionally, 14 semi-structured interviews were conducted with employers of micro-enterprises (with less than 10 employees) and small enterprises (10-49 employees) – whose business area requires hiring professionals with degree or higher education diploma: mass media, communications, printing, dentistry, private secondary education. Employers from Riga region who had some engagement with higher education institutions in recent past (have been lecturers, members of examination or accreditation commissions, mature students), thus have been familiar with higher education system, were included in the sample. Three interviews with representatives of large enterprises (in this case all three enterprises have more than 1000 employees) – a pharmaceutical company, a plywood producer and a dairy – were used in this research, one of them was published (Jakobsons, 2007), two others – conducted within the framework of the current research. The pharmaceutical company has a significant research unit, therefore a large part of its human resources are specialists with higher education. The plywood production company and dairy both require higher education in engineering and management positions that form around 25-30% of their human resources. All three large

enterprises included in the sample are stable businesses, established more than 20 years ago and therefore were considered to be long-term partners of higher education institutions.

The labour market

The period of transition economy in Latvia started with an abrupt isolation from what had been a large market on the East – the former Soviet Union. As a result big industrial enterprises (several of them were closely linked with the Soviet military industry) went bankrupt in the early 1990s. Within a decade (1990-1999) more than 50% of industrial workers lost their jobs and their qualifications and experience became useless (Vipule, 1999). The de-nationalization and privatisation of all kinds of enterprises led to the departure from extensive economics with full employment where everybody worked, mainly delivering no significant result, to more intensive and efficient way of production, thus even more people became unemployed. Unemployment was a new phenomenon requiring a legal framework, therefore the Law of Employment was passed in 1992. In 1997 a period of the economic growth started: entrepreneurs which had found targeted the former Soviet Union as their market largely reoriented their exports towards Europe, establishing partnerships. It became clear that lots of skills suitable in the Soviet era will never be useful again and people started to look for new qualifications. Therefore some part of the previously unemployed enrolled in higher education and became students.

As the independent country and its economy strengthened new fields of professional activities emerged: entrepreneurship, banking, social work, logistics and customs, defence, public communication and advertising, information technologies, etc. The remaining "post-soviet" industrial enterprises alongside with smaller businesses had to look for innovative solutions to stay competitive. Thus the demand for skilled and educated employees increased in the labour market.

The increase of employment and decrease of unemployment remained even until the economic downturn in 2008. Data from Central Statistical Bureau show that unemployment rate increased from 6% in 2007 to 18.7 in 2010. Until 2008 there were more people employed with a completed upper secondary education (with no qualifications) than people with higher education diplomas and qualifications (on average – 15%). In 2008-2010 20% of those with upper secondary education lost their jobs, and only 5% of those with higher education. Thus in 2008 we saw for the first time the number of employees with higher education exceeding the number of those with upper secondary education in the Latvian labour market.

Higher education

Three legal acts framed changes in higher education in Latvia after the regained independence: the Law on entrepreneurship (1990), the Law on education (1991) and the Law on higher education institutions (1995). Two key aspects introduced by these laws were private funding of the education and academic freedom. 24 new higher education institutions were established during the first decade of independence (15 – by private owners) (data from Register of higher education institutions). Enrolment in higher education quadrupled from 8.4 thousands in 1992 to 34.1 thousand in 1999 (data from Ministry of Education and Science reports).

More than half were people with work and life experience gaining new qualifications. Responding to the labour market demands, new fields of studies emerge, such as business management, banking, computer technologies, etc. On the other hand, new study fields provided by the higher education institutions created initial impulses for new segments of professional activities to emerge, like social work and psychological consulting (Kestere & Gravite, 2011).

The number of state funded study places remained more or less the same during the whole period, therefore in 2008 75% of students both in private and state owned higher education institutions were paying their fees themselves, or using state guaranteed study loan system (data from Ministry of Education and Science reports). With the onset of an economic downturn, the rise of unemployment, stagnation of businesses and budget austerity directly affected both the household income level and – alongside with that – ability to pay tuition fees. The enrolment in higher education dropped by a quarter – from 41.6 thousands in 2008 to 31 thousand in 2010 (Ibid).

The interaction between the labour market and higher education

There are three stakeholders in the process of interaction between the labour market and higher education: higher education institutions, employers and students who are to become employees. Successful partnerships between higher education institutions and employers are the results of strategic approach and long-term collaboration.

Interviews with employers showed different approaches from small and large enterprises. Small businesses usually don't have the time and/or resources to invest into collaboration with the higher education institutions – especially in the periods of rapid changes. A more common practice in 1990s was to send an employee to some crash courses to obtain particular professional skills needed for new tasks. Another widely spread practice was on-site vocational training. Three of the employers admitted that their office at times reminded of a make-shift vocational school for beginners: people were hired, trained and soon they moved to better paid jobs in other companies. One of them finally contacted a newly established private higher education institution, interested in providing the necessary education, and together they developed a study programme (digital graphic design) that met all requirements of the employer. However, such success stories are not characteristic of the period of changes.

The employers adapted to new, dynamic market situation much faster and easier than higher education institutions and the academic society. The largest difficulties were faced in case a higher education institution had guaranteed state funding and was in a monopoly situation as they did not feel a need to change. Medical education provided a good example: one interviewee – the owner of a private dentistry practice – described the professorship of the institution she graduated from as "a group of conservative, self-sufficient people who think that they are the smartest in the world and don't need to listen to anybody". When asked about the role of the professional society – the Dentists' Association – she replied: "They form the board of that as well!". In dentistry, private school and editorial boards of magazines an excellent graduate from the higher education institution was considered to be "a good material to start to work on". For employers in public

communications, advertising and publishing businesses the formal education in 1990s was not considered relevant at all – the employee's experience and creativity were much more important, thus the employers of micro-enterprises and small enterprises that formed the biggest part of the labour market (98%) showed little or no interest in collaboration with the higher education institutions. During the following period of economic growth some employers themselves decided to continue studies or to gain a formal education and/or additional qualifications (4 out of 14 interviewees). Two interviewees returned to studies during the economic downturn as their business activities became less intense.

Three interviews with the representatives of large enterprises (only 0.26% of employers in Latvia are large enterprises) showed different approaches to collaboration with higher education institutions, being involved in such activities on a long-term basis. These companies managed to emerge from old soviet enterprises due to innovative production and business solutions. As soon as they reached some economic stability in late 1990s they re-established partnerships with particular higher education institutions providing study programmes in the field of their interest. The pharmaceutical company and the plywood production company have long-term cooperation programmes with universities. The first one provides scholarships for successful students, runs research competitions and allows students to do their research or spend internship period in its laboratories. The other provides internship places and makes suggestions on changes in the curriculum. The dairy mainly delegates its concerns regarding the curriculum to a professional organization – the Dairy Farmers society – and deals only with students on internships. All three are involved in the process of evaluation of study programmes and assessment of diploma works. The chance to get acquainted with students – potential employees – as early in the study process as possible was mentioned as the main advantage of collaboration. Two representatives of small businesses also agreed that participation in assessment of diploma works allow them to "skim the cream" by offering a job to the most talented graduates. The plywood production company's representative admitted, however, that the best and most devoted graduates remain out of their reach as they come from families that run their own businesses in related fields (timber production, log buildings, furniture production, etc.). Because of their background knowledge and experience they are the most demanding students and – consequently – become good professionals, but they usually return to their family business. It was admitted in the interviews that the willingness to collaborate with the higher education institutions is driven purely by the business interests of the employers, therefore they have no intention to maintain the partnerships if their own affairs are endangered. Their interest in hiring new employees or making suggestions for the curriculum is cyclic, it depends on their plans to expand, or implement some innovative solutions. The last economic downturn of 2008-2010 however did not affect these three large enterprises – partly because of a smart, skilled and well educated managerial and engineering staff who were able to make the right decisions in right time.

Conclusions

Despite the ongoing public discussions about poor collaboration between employers and educators, the positive influence of expanding higher education on

the working population and the labour market seems to be evident, although the contribution of the higher education system to the increased welfare of the country remains a subject of unresolved debate.

Large, well-established companies are most likely to be interested in collaboration with higher education institutions, but they form the smallest part of employers, although each of them has large number of employees. Smaller companies are much more dynamic, their impact on labour market is stronger: one might say that they are the ones that create those widely discussed "labour market demands". They are also more open-minded to innovations and learning, although their resources are not sufficient for maintaining long-term partnerships with higher education institutions.

It is hard to maintain long-term strategic partnerships during periods of economic collisions when both the employers and the educators are affected. However dialogue between labour market and higher education remains strong through the main stakeholder who brings the demands of labour market into higher education – students/potential employees.

The biggest employer in the labour market that has the strongest influence on higher education is the state. The assessment of its impact on the labour market/higher education relationship through funding, legislation and strategic planning in Latvia's case requires further research.

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NEOLIBERAL VALUES AND DISABILITY: CRITICAL APPROACH TO INCLUSIVE EDUCATION

Abstract

Neoliberalism is a global phenomenon which has various forms. It is an ideology, as well as a package of political actions. Although it is an economic concept, nowadays it is present in all areas of social life, including education. Explicitly, neoliberalism facilitates cooperation between diverse social factors. However, its implicit purposes are capital accumulation and economic growth, and thus in collision with civil rights such as free access to social resources. From the aspect of education, neoliberalism is a pillar of social practices based on one's own activity, i.e. participation. This means that an individual is responsible for own well-being, regardless of conditions he/she lives in. Since children with disabilities are socially marginalized, neoliberal principles of participation within mainstream settings and taking over responsibility for own action in current social conditions are questionable. Therefore, in this paper, the presence of neoliberal orientation in inclusive education will be scrutinized. In this way, a critical approach to contemporary interpretations of inclusive education is addressed.

Keywords: inclusive education, children with disabilities, special education, neoliberalism, participation

Introduction

During 1970s and 1980s, neoliberalism was perceived as political and economic practice focused on individual's well-being (Steger & Roy, 2010). Society's neoliberal orientation was characterized with entrepreneurship and personal hedonism as a mechanism of stimulation of economy and trade (Harvey, 2007). According to these ideas, government's responsibility was providing appropriate conditions for trade and capital circulation. However, in certain social areas, which are non-profitable (such as education, social care and nature preservation), governments made interventions for the emerging capital. Neoliberalism, according to Torres (2009), is supported by many international organizations which promote decentralization of education and its standardization (including outcomes), and introduction of new methods of teaching, with one purpose only – to increase its efficiency, i.e. competence of children. The fact that competencies are closely related to neoliberalism can be seen in the presence of educational recommendations and standards which are, basically, norms prescribed by certain interests groups (Barnes & Mercer, 2001). In relation to inclusive education, competencies are one of its major arguments, i.e. competencies acquisition is interpreted as pro inclusion argument. Closely observed, social regulation of competence acquisition (through educational institutions and their protocols) is argued as a prerequisite of autonomous and efficient adulthood. Thus, educational institutions are places for preparing future workers and tax payers. In other words, neoliberalism is driven by material well-being and profit accumulation, even in those areas which can't emerge

profit, such as social services, health care, and education. These areas exactly have a great importance for children with disabilities and their families.

In education, neoliberal values are smokescreened with cost benefit analyses, strategic plans, and educational outcomes (Steger & Roy, 2010). This is in collision with inclusive values such as individuality, personal growth, belonging, and togetherness because neoliberalism is about competitiveness, capital accumulation and consumption of material goods. I.e. neoliberal values and inclusion are mutually exclusive. Since institutions regulate social practices, and, subsequently, individual's behaviour (as much as it is possible), educational institutions have one big task to preform continuously and that's to maintain dominant social order (Foucault, 2003; Searle, 2010). Thus, the question is forming – can contemporary education, which is explicitly based on inclusive values (yet driven with neoliberal ones), truly contribute to child's well-being? Also, what is the teachers' role in the classrooms – should they nurture basic human values such as togetherness and mutual support, or should they be focused on competencies and productiveness? Some may argue that there is no need for dichotomy in analysis of inclusive education, which is dystopia. Moreover, critical views on contemporary educational concepts contribute to social dialogue, and exchange of personal experiences. At this point, inclusive education is rarely scrutinized. Thanks to its roots in human rights, scholars see this concept free from critical questioning. Critical approach is often attacked as researcher's anti-inclusive orientation, which resulted with rare philosophical underpinning of this field. However, if we acknowledge that epistemology and ontology are the pillars of education in general, than we can question its various forms, and repercussions on one's life, regardless of social imperatives and expectations. In that way science is proven to be autonomous and free from politics.

Vagueness of Inclusive Education

Inclusive education, interpreted as a child's presence in the mainstream settings, indicates that physical positioning of children with disabilities in mainstream classes is sufficient. However, close observation of educational practices showed that children with disabilities experience rejection if the environment isn't adequately prepared. Adequate preparation encompasses the presence of positive attitudes of preschool teachers, peers and parents towards children with disabilities, an individual program based on child's developing skills and abilities, and functional didactic materials (Buysse, Wesley & Keyes, 1998), and not just architectural design. Furthermore, inclusion interpreted solely as mainstreaming is based on a presumption that all children with disabilities can fully participate in mainstream classes on their own. This misconception is derived from its ideological foundation, and a close connection to human rights. Briefly, the right to an adequate education become a synonym for mainstreaming, which brings us to a reduction at a linguistic and semiotic level. Today, the term inclusion is used to describe various social and educational contexts, without clear criteria. According to Bishop and Trout (2005), terminology reduction is often present when it comes to socially marginalized groups. This happens due to science's moral issues of protecting the oppressed, i.e. scientists tend not to profound already present subordination of certain social groups. Another problem in inclusive education is that in a short amount of time it

became a widely accepted concept, with a vast of (more or less competent) practitioners interested in this issue. Nowadays, many individuals feel an urge to work with children and adults with disabilities, often without adequate education, especially in the field of philosophy. Arbitrary definitions, constructed upon one's own opinion, and not the scientific canon, result in confusion and inappropriate practices.

However, if we accept that inclusion is an active participation which presupposes a free access to social resources (including interpersonal relations) with an opportunity to make free choices, then inclusive education represents a possibility and not an obligation for a child with a disability and his/her family. This means that inclusive education and special education, as two organizational forms of education for children with disabilities, are not mutually exclusive. At the pragmatic level, inclusive education could embrace special education's resources, such as the canon of knowledge about disabilities and appropriate teaching strategies. This is possible from at least two reasons: firstly, an insight into pedagogical and philosophical literature from the last three decades (Gould, 1981; Shakespeare, 1996; Danforth & Rhodes, 1997; Thomas & Tarr, 1999; Norwich, 2008; Thomas & Loxley, 2001; Vehmas, 2004; Florian, 2006; Slee, 2006) reveals the presence of an initiative for deconstruction of terminology based solely on the normative approach, which is, according to these authors, the main reason for child's disabilities, not the impairment itself. In other words, disability is a result of social arrangements, not person's biological characteristics. Secondly, if the term special is referring to specific teaching strategies, and rehabilitation methods as well as therapeutic actions, then they can't be compared to those intended for so-called children without disabilities. This means that inclusive education distinguishes appropriate practices for children with disabilities from those intended for their peers. However, contemporary educational policies and agendas blurry address terms like inclusion, disability, and developmentally appropriateness, which results with conceptual equalization of inclusive education with mainstreaming. Moreover, inclusive education today is argued to be the only possible and only appropriate form of education for children with disabilities, which resulted with an extreme perspective on inclusion (Florian, 2006). Since the inclusive education is accepted as an indicator of quality of education at international level, it is important to question its implicit meaning and explicit interpretations, and subsequently, its repercussions on the quality of life of children with disabilities.

Further reasons of misinterpretations of inclusive education could be found in linguistics and semiotics. One of the major problems in linguistics is the presence of *nomenclaturism*, i.e. misconception that language is an inventory of names for objects, materials, phenomena etc. (DeSassure acc. to Joseph, 2004). I.e. inclusion isn't just a term that denominates the process of placing children with disabilities into so called mainstream settings. It is a multidimensional phenomenon consisted of social protocols and interpersonal relations. Besides, comprehension/ understanding of certain terms is a complex process based on neurolinguistic recognition and distinction of lexical elements. Whereas, almost every word could be used in various ways, according to the context, it is important to recognize its "generalized meaning", i.e. its "denotative function or the representative function and system of associations and generalizations which stands in its core" (Vygotsky

acc. to Luria, 1982, p. 182). This "polysemic nature of language indicates that understanding is related to different systems of generalization and an active process of choosing between its possible meanings" (Luria, 1982, p. 184). Today, in the highly competitive societies, the process of constructing terms related to education is influenced by neoliberalism because the outcomes are the most important aspect of education. Children are pushed to achieve prescribed outcomes, otherwise they will be identified as underachievers and problematic. It is obvious that this kind of approach to education is the least inclusive one. Moreover, this contributes to classroom marginalization of children from underprivileged backgrounds and children with disabilities. Therefore, inclusive education presupposes scrutinizing terms from various standpoints. In that way, the dialectic exchange between a child with disability and its surrounding is supported, and, subsequently, characteristics of inclusive education could be identified. Otherwise, we are tapping in the dark, just assuming what the inclusive education is all about.

Implicitness of Neoliberal Values in Inclusive Education

Neoliberalism, as we know it today, has been developing through several decades, yet one look in the past shows that its first wave was complement with inclusive values. In fact, first neoliberal wave was focused on achieving personal freedoms and right to work for own economic benefit, i.e. personal wealth (Torres, 2009). Access to the labour market is an important aspect of life for people with disabilities, because for ages, societies perceived them as a population unable to work and contribute to their own independence. However, the second wave of neoliberalism (from 1990 until 2000) was oriented on the societies' progress through individuals' achievements (Steger & Roy, 2010), i.e. society's well-fare had to be achieved through individual's efforts. Actually, these years were the time when inclusion emerged, as one (and today interpreted as the only) solution for society's competitiveness. This resulted in a social regulation of inclusive education where an accent was put on learning skills for independent living. From my point of view, the imposition of independent living is denying one's right to a social support. Also, switching responsibilities from society to person contributes to exclusion, poverty and a gap between the marginalized and their surroundings. According to Castel (2003, p. 12), every society has its so-called "dependent communities", i.e. "citizens who, due to their characteristics, need society's support", and fair societies recognize their presence and provide adequate support. Often, education is obligated to provide support on its own capacity, with minimum involvement of other institutions such as social welfare and health care. Some authors (Chomsky, 1999; Castel, 2003; Foucault, 2003; Torres, 2009) see the reason for this paradox of inclusive education see in society's sustainability, i.e. societies must control the realization of human rights because an omnipresent access to resources needed for one's rights, potentially leads to destabilization of government's stability. Although these claims are based on the philosophy of inclusion, and rarely addressed in media, pedagogical literature, and public discussions, Fuchs and Fuchs (1998) warn us that the absence of coordination between social systems and the lack of adequate social conditions potentially leads to failure of inclusive education. Fortunately, at this point, teachers are overarching this problem with their own enthusiasm, and personal acquaintances.

According to some authors, mainly anthropologists and philosophers (Chomsky, 1999; Bruner, 2000; Schönpflug, 2001; Searle, 2010) primary tasks of educational institutions are the regulation of social relations and individual's behaviour. In other words, education is a mechanism for the maintenance of a social order. Subsequently, teachers are burdened with implementational parallelism – in one hand they are expected to nourish human values and reciprocity in classrooms, while in the other hand, they have to equip children with prescribed competencies (especially those concerning independent living and productive adulthood) in highly competitive settings. Since neoliberalism is adjustable to diverse social contexts (Steger & Roy, 2010), it is important to identify the drivers of the inclusive education. Is inclusive education driven by the inside will of dominant population (so-called non-disabled people), or is inclusive education imposed from outside/ social authority, or maybe, is inclusive education somewhere in between these points? Nevertheless, it is important to scrutinize proclaimed values and possible benefits from different standpoints, individual's as well as the one of the society. In that process, science has an inevitable role, and scientists have a moral and ethical obligation to support diverse views. Specifically, scientist should provide support during social dialogue and construction of inclusive education, not just to stand by and observe what will happen next.

Conclusion

Appropriate scrutinization of inclusive education presupposes the philosophical underpinning, especially epistemology and ontology, which enables us to question its purpose – is inclusive education a social value, or is it a normative goal? Despite many interpretations and perspectives within our reach, inclusion is basically used without any critical questioning. This reduction in social practice wouldn't be problematic if societies were arranged in the way that supports individual's self-actualization, and if social resources were accessible to everyone, i.e. if socio-economic conditions would contribute to equality among all people. Although this sounds like utopia, it is the core process of divided responsibility, and, subsequently, democracy.

At this point, inclusive education is equalized with mainstreaming, which contributes to social oppression of children with disabilities, especially those with severe impairments. It is obvious that inclusive education conceals many social issues such as independence, profit accumulation and sustainable politics, which are, basically, neoliberal values. Despite certain interpretation that this kind of approach is anti-inclusive and discriminating, critical approach to inclusive education is needed. Knowing and understanding inclusion's weaknesses and benefits leads to its development and quality enhancement, which is one of the strongest argument for constructing a dialogue on this issue.

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AGING MEMORY IS *NOT* A LIMITING FACTOR FOR LIFELONG LEARNING

Abstract

Efficient memory is one of the necessary cognitive potentials required for virtually every form of lifelong learning. In this contribution we first briefly review and summarize state of the art of knowledge on memory and related cognitive functions in normal aging. Then we critically discuss a relatively short inventory of clinical, psychometric, and everyday memory instruments usually employed in healthy older population memory assessment. In final section, some of new approaches and promising methods in this area will be outlined and proposed as alternative methods for elderly memory and cognition screening. We conclude that normal memory aging is by no means a limiting factor for successful lifelong learning and that we are currently in need of new approaches to memory assessment, valid yet not laborious for older adults enrolling in lifelong learning programs.

Key words: memory, cognitive aging, memory assessment, lifelong learning

Memory in aging: a very brief overview

Common and regretfully popular notion of memory decline with age represents sort of knowledge not warranted by scientific literature on cognitive aging. Objective memory lapses and subjective complaints on memory are in fact relatively seldom reported by healthy older adults. Estimates of elderly population experiencing objectively measured memory problems vary with subject samples and diagnostic instruments employed. For instance, in Plassman et al. study conducted in USA representative sample of subjects aged 71 years and older (N = 856) a total of 13,9% subjects suffering from dementia of some form was established. Notably, only less than 5% subjects in cohort 71-79 were diagnosed with dementia, the percentage rising up to 37,4% in those aged 90 plus (Plassman et al., 2007). Other forms of memory impairments, such as those seen in mild cognitive impairment (MCI), are diagnosed more often but not at a dramatic rate, MCI incidence ranging from 17-34% in various studies (Petersen et al., 2001). Subjective memory complaints are reported by 22-37% of elderly, according to one large sample studies meta-analysis (Jonker et al., 2000). Taken together, such data suggest memory problems of various etiologies to be expected by no means in majority of elderly.

When analyzing the trajectory of memory in aging, it is essential to specify function/s referred to. Memory registers and functions can be classified with respect to memorized information duration (brief sensory iconic and echoic, short-term, and long-term memory), to information modality (verbal, visuo-spatial, motor) or to retrieval task and retrieval conditions (recognition vs. reproduction, free, serial or cued). Arguably, the dominant model of short-term memory is the Baddeley's and Hitch's Working memory model, which posits this memory register to consist of three "slave" systems (phonological loop, visuospatial sketchpad, and episodic buffer) coordinated by super ordinate system called central executive (Baddeley,

2003). Squire's long-term memory model with the dichotomy between declarative (explicit) and non-declarative (implicit) memory and further division of declarative into semantic and episodic memory provides a good framework for aging memory studying (Squire, 1992). Finally, distinction of retrospective and prospective memory bears special significance for aging memory understanding, as the latter refers to the cases of remembering to do something some time in future.

Certain memory functions appear to be moderately affected by normal aging. Most pronounced is the episodic declarative memory decline. Cross sectional and to somewhat lesser extent longitudinal studies show gradually poorer efficiency of stories heard/read remembering, lists of unrelated words and word pairs recalling, and familiar faces recognizing with age (Salthouse, 2003). Normal aging affects short-term memory in a specific way. While standard short-term memory measures, like simple digit- or word-span, do not show marked decline with age, more elaborate complex span tasks show clear decreasing trend (Oberauer et al., 2003). Complex span tasks require simultaneous cognitive processing (e.g. simple arithmetic problems solving) *and* short-term memorizing (digits-solutions to the problems) thus taxing subject's potentials for focusing and shifting attention between the two processes. Adding concurrent task to simple memorizing diminishes results of elderly (e.g. Li, 1999). In addition, cognitive performance of elderly is more disrupted by incongruent distraction, i.e. by stimuli not related to the task, compared to young subjects performance (Weeks & Hasher, 2014). Such findings suggest executive attention to be inversely related to aging, executive attention being the function of central executive. Autobiographical memory shows specific but not steep decline with age (Fromholt et al., 2003). Elderly subjects also seem more prone to retrieval errors, both in laboratory, and in ecologically more relevant tasks of eye witnessing (Jacoby & Rhodes, 2006). Finally, general cognitive speed decrease with aging is considered well established fact (Salthouse, 1996).

By contrast, large areas of memory functioning seem to be spared and even improved in aging. Despite general senses weakening, sensory memory seems to remain intact in elderly. Laboratory tasks with brief auditory or visual word fragments presentation show that older subjects are equally successful at integrating fragments into words when fragments presented either auditory (Parkinson & Perry, 1980) or visually. Experiments with brief visual presentation of the kind suggest iconic memory in elderly to be even of somewhat longer duration than in younger (Kline & Orme-Rogers, 1978). It is safe to conclude with this respect that content that can be perceived also can be learned by elderly. Semantic memory also seems to be little affected by normal aging, as opposed to episodic memory. This declarative long-term memory domain contains conceptual knowledge acquired in one or in number of learning episodes. Typical indices of semantic memory, like word or general information knowledge at their worst do not display decline but mild improvement until mid sixties of age (Dixon et al., 2004), while in most of studies they show stable improvement during whole life (Park et al., 2002). Prospective memory in elderly appears to decline, but to a much lesser extent than episodic and working memory. Such decline is detectable mostly in laboratory tasks (e.g. Craik, 1986). Naturalistic prospective memory studies placed in everyday setting (e.g. sending a postcard or making a phone call) demonstrate that elderly subjects constantly perform better than younger ones (Rendell & Craik, 2000).

Finally, meta-analysis of 33 implicit memory researches showed very mild or no decline of this type of memory in aging (Light & La Voie, 1993).

Memory assessment in normal aging: in need of new paradigms

Memory assessment in elderly is generally aimed at detecting subjects with memory impairments or identifying those at risk of dementia in older adult's population. Objective methods for memory assessment broadly fall into three categories: psychometric, clinical, and behavioural, testing so-called everyday memory (Christensen, 1991). Subjective complaints of poor memory display no or weak correlation with objective test performance in elderly (Sunderland et al., 1986).

As much as ascertaining normal memory functioning in elderly is important when including them into some form of lifelong learning, standard methods are tiring and laborious even for subjects with completely preserved memory. Widely accepted psychometric battery, Wechsler Memory Scale (Wechsler, 1987), for instance, takes 45-60 minutes for completing. Administration of Rivermead Behavioural Memory Test (RBMT; Wilson et al., 1999) may well take more than 30 minutes with elderly. Besides that the very experience of being tested can be frustrating, it is worth noting that the most of established instruments for memory assessment may prove difficult for elderly because of time pressure, leaving them little sense of accomplishment upon testing.

Recently, a novel approach to older adults memory screening, Semantic Interference Test (SIT), was validated on a large scale community sample (Snitz et al., 2010). SIT builds upon the fact that Alzheimer's patients and people with MCI suffer from specific long-term memory deficits preventing them of effective semantic retrieval cues use (Loewenstein et al., 2003). Subjects from the groups mentioned are prone to semantic intrusions, substituting the target item in a word recall task for a semantically similar exemplar ("glass" for "mug"), but also to the two types of retrieval interference, proactive inhibition (PI) and retroactive inhibition (RI). Both PI, i.e. newly learned material retrieval inhibited by competing effects of the old one, and RI, i.e. recall of previously learned material inhibited by a new one, appear to be caused by ineffective use of cues distinguishing material originally learned from the one formerly or later learned. SIT materials consist of two sets of 10 common household objects. Sets are chosen to consist of objects belonging to the same semantic categories (e.g. "ring" in set 1 corresponds to "bracelet" in set 2), thus making two sets recalling difficult. SIT starts with set 1 objects learning (by identifying objects hidden in an opaque bag by touch). Success in list 1 learning provides measure of episodic learning. Next, subjects learn objects from the set 2, interfering with set 1. Shortly delayed recall of set 2 items provides a measure of PI (from set 1 previously learned). Recall of set 1 that follows afterwards provides a measure of RI (from set 2, learned after the set 1). Finally, after a 20-minute delay subjects are asked to recall set 1 items. Intrusions provide a measure of RI in long-delayed recall.

All the SIT scores, PI score most prominently, discriminated in a large cohort of healthy older adults (age range 65-99; average 77,51) groups of those with intact cognition from those with mild cognitive difficulties affecting daily functioning (Snitz et al., 2010). Obviously, the latter group would require special attention when

enrolling in any of lifelong learning programs. Unlike standard memory tests, SIT apparently has the appeal for subjects with refusal rate less than 2% in Snitz et al. (2010) survey. It requires no reading and does not resemble standard paper and pencil, school exams – alike tests. SIT can be administered to illiterate persons and requires no translation and back-translation. Finally, SIT measures are less influenced by subjects' educational attainment than standard memory tests, as revealed by low correlations of SIT measures and reading ability, taken as a proxy for quality of education by Snitz et al. (2010). SIT was therefore proven to be a useful tool in general elderly population screening.

With similar motivation, we have revisited validity of verbal fluency tasks in verbal ability and memory in elderly assessment. Interestingly enough, verbal fluency was established to be the first measurable indicator of pathological cognitive aging, as revealed by 14-year longitudinal study of large scale population based elderly sample (N = 3777; Amieva et al., 2008). In our research of verbal ability and memory tasks validity in discriminating samples (N = 32) of healthy young (mean age 21,56) and elderly (68,88) subjects matched by gender and education Wechler's vocabulary, phonemic fluency (phonemes: K, L, and S; PF), semantic fluency (categories: animals, fruit, vegetables; SF) and semantic fluency with categories switching (clothing-vehicles, names-toponyms, food-furniture; SFCS) were administered, fluency tasks asking subjects to provide as many instances of the criterion as possible within one minute. Results suggest differences in vocabulary, as a marker of general language development and crystallized intelligence, PF, SF and SFCS to go in expected direction, younger participants accomplishing somewhat larger scores in all of measures. But, stepwise discriminant analysis with the age group as grouping variable has shown SFCS number correct items (F to remove = 10,78; standardized canonical coefficient = 0,640) and vocabulary subtest score (F to remove = 6,78; standardized canonical coefficient = 0,522) to be the only variables contributing to the single discriminant function (canonical correlation coefficient 0,690; Lalović & Jovović, 2013). Such outcome, bearing in mind the nature of SFCS task requiring executive functioning over and above verbal ability points out to potential benefits of adding SFCS task to the list of standard memory and cognitive tests for older adults. SCFS administration is easy and quick, subjects do not find it difficult or laborious. It may serve as a practical marker of executive functioning, working memory, and even crystallized lexical knowledge, as it moderately correlates with vocabulary (Pearson's r = 0,42; Lalović & Jovović, 2013).

Conclusions

Contrary to the widespread belief, serious memory decline need not be a part of normal cognitive aging. Normal aging seems to be the vital condition for successful and enjoyable participating in lifelong learning programs. Literature review suggests decline in episodic memory, and working memory followed by general cognitive slowing in older adults. Working memory somewhat poorer performance should be attributed primarily to executive functions in aging decline. Cognitive slowing is not the memory function per se, but it affects all the cognitive processes, memory included. In contrast, sensory, semantic, nondeclarative and prospective memory appear to remain intact or even getting better with age. Most of current methods for

memory assessment are aimed at detecting people with memory problems in elderly population and those at risk of developing such problems. In context of lifelong learning those instruments seem unnecessery long, laborious and tiring for elderly, making their use questionable. Currently, we are in need of valid but not that extensive and detailed alternative ways of providing insights into aging memory and cognition functioning. Two of attempts in that direction were outlined, both of them showing promise in memory and related cognitive abilities of prospective lifelong learners brief screening. In light of the existing evidence, tentative conclusion of normal memory aging in most cases being not the obstacle for comfortable everyday living seems warranted. At the same time, memory in normal aging seems capable of supporting various forms of lifelong learning.

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MARLENA PLAVŠIĆ & MARINA DIKOVIĆ

STUDENTS' PLANS FOR LIFELONG LEARNING AND TEACHING

Abstract

One of the roles of higher education is to prepare and encourage students for lifelong learning. However, no evidence can be found about students' plans for further learning and teaching related to formal, non-formal and informal context. The purpose of this study was to explore these students' plans in relation to their study group, level of knowledge about formal education, non-formal and informal learning, study year, parents' formal education and monthly income. 553 students from Juraj Dobrila University of Pula took part in the study. Students of educational sciences, humanities and economics differed in their plans for further informal learning, while no differences were found regarding their plans for their further formal education and non-formal learning. When it came to plans for teaching, students differed in their plans for informal teaching regarding their study groups, study year and fathers' formal education. No differences were found in students' plans related to the level of mothers' formal education and monthly income. Results are discussed in the perspective of lifelong learning.

Key words: lifelong learning and teaching, formal education, non-formal and informal learning, students' plans, parents' formal education, monthly incomes

Introduction

Education is a process that lasts for a lifetime. As teachers, we need to further explore how we can use creative tools to ensure that our learners recognise the need for lifelong learning. It is up to teachers to reflect on how to promote education as a creative process (Ogunleye, 2008) and experience.

The need for lifelong learning has also been recognised at the global and national levels. For example, Europe 2020 (European Commission, 2010) emphasises that Europe must act, among other things, within education, training and lifelong learning. Croatian government recognises that modern education development strategies are based on the concept of lifelong learning and the concept of learning society (Vlada RH, 2001).

The concept of lifelong learning, developed in the sixties of the last century, mostly relates with objectives of economic nature, such as improved competitiveness and long-term employability. However, at the same time there are equally important objectives that contribute to the active role of individuals in society, such as fostering social inclusion, development of active citizenship, and the development of individual potentials (Pastuović, 1999). Schools and educational institutions have a major role in preparing and motivating students for lifelong learning by teaching them how to learn and by encouraging positive attitudes towards learning (Klapan, 2007).

Lifelong learning is accomplished through the model of formal, non-formal and informal learning. According to this model (Coombs & Ahmed, 1974; European Commission, 2001), formal education is the institutionalised, chronologically and

hierarchically structured "education system", that stretches from primary school to university; non-formal learning is any organised and systematic educational activity outside the formal system that provides selected types of learning to particular groups of people regardless of their age; and informal learning refers to the lifelong process, unorganised and often unsystematic, by which every person acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment.

One of the roles of higher education is to prepare and encourage students for lifelong learning. However, no evidence can be found about university students' plans for further learning and teaching related to formal, non-formal and informal context.

The purpose of the study

The purpose of this study was to contribute to the previously described model of formal education, non-formal and informal learning (Coombs & Ahmed, 1974; European Commission, 2001) by exploring university students' plans for lifelong learning and teaching of these types of education and learning. The objectives of the study were: (1) to explore if there are differences in students' plans for formal education, non-formal and informal learning considering their study group, knowledge about formal education, non-formal and informal learning, year of study, parents' formal education and monthly income; and (2) to find out if there are differences in students' plans for non-formal and informal teaching, again considering their study group, knowledge about formal education, non-formal and informal learning, year of study, parents' formal education and monthly income.

Method

A total of 553 students from Juraj Dobrila University of Pula took part. Their age ranged from 18 to 36 years. One quarter of them (23.5%) were male students and three quarters (76.5%) were female students. They were chosen to meet the following criteria: 1) affiliation to study group that is trained for teaching and a study group that is not trained for teaching; 2) presence of all study years; 3) representation of the university gender ratio.

They differed according to their:

a) Study group: 52.5% of students in the sample studied economics, 21.2% studied educational sciences and 26% studied humanities. The latter two groups study to become teachers.

b) Knowledge about formal education, non-formal and informal learning: it was examined with a 15 items test that was created for the purpose of a larger survey that was exploring students' knowledge and attitudes about formal education, non-formal and informal learning. 16% of students in this sample scored higher than one standard deviation above the average result on the test, while 13% scored less than one standard deviation below the average result.

c) Study year: 38.2% of students in this sample attended the 1st, 20.4% the 2nd, 23.1% the 3rd, and 18.3% attended the 4th and 5th year.

d) Parents' highest formal education: 4.3% of fathers and 8.5% of mothers in this sample completed elementary school as their highest formal education, 68% of

fathers and 62.4% of mothers completed high school, 23.3% of fathers and 25.1% of mothers completed college/university and graduate studies.

e) Monthly family income: 4.5% of total sample had income up to 2.000 kn (Croatian kuna); 12.7% had 2.001 – 4.000 kn; 25.9% earned 4.001 – 6.000 kn; 34.4% earned 6.001 – 10.000 kn; and 17% had more than 10.000 kn.

Data were collected in a larger survey that examined students' knowledge and attitudes related to formal education, non-formal and informal learning. Instruments were administered during lectures at the university with students' oral consent and anonymously. Students were firstly given the knowledge test on formal education, non-formal and informal learning. After it was filled in and collected, students were instructed about the three forms of education/learning. Then they were given, among other, open questions about their plans for formal education, non-formal and informal learning, as well as for their formal, non-formal and informal teaching. Answers to these open questions were then categorised and analysed. A coding system was used for collating data from the two phases.

Results and discussion

Students' plans for future formal education, non-formal and informal learning

In order to answer to the first objective, chi-square tests were performed. Students mostly report about their plans for non-formal learning (27.7%), then for formal education (20.4%) and least for informal learning (17%). The only significant difference is found in plans for informal learning among students of different study groups (χ^2=17.9; df=8; p=0.02). Future pre-school teachers and primary school teachers (36.1% of those who answered) mostly want to learn about art techniques, maybe because their teachers during study encouraged them to that. Maybe they understand that art techniques cannot be leaned at once, but it takes lifelong time to learn something new and useful for work with children. Students of economics (31.2%) mostly plan to take one to one lessons in mathematics, probably because they look at the near future and will seek help for the coming exams. Students of humanities (38.6%) give answers that are least focused – so they fit the category "other", for example: *Everything; Volunteering; Reading; Playing bridge; Juggling*, etc.

Other comparisons do not reveal any significant differences. Students of educational sciences, humanities and economics have similar plans for pursuing their formal education (various studies or postgraduate studies; χ^2=2.12; df=2; p=0.35) and non-formal learning (foreign languages and diverse, unfocused plans; χ^2=0.99; df=2; p=0.61) probably because their motivation for studying, its continuation and obtaining various licenses does not differ regarding their study group. Regardless of their knowledge about formal education, non-formal and informal learning, students report of similar plans for formal education (various studies or postgraduate studies; χ^2=2.33; df=1; p=0.127), non-formal (foreign languages and diverse, unfocused plans; χ^2=1.87; df=1; p=0.171) and informal learning (foreign languages, art, social sciences and humanities, natural sciences and mathematics, and other χ^2=1.57; df=4; p=0.814). Students of every study year identify similar plans for their further formal education (various studies or postgraduate studies; χ^2=4.38; df=3; p=0.223), non-formal learning (foreign languages and diverse, unfocused plans; χ^2=2.36; df=3; p=0.502), and informal

learning (foreign languages, art, social sciences and humanities, natural sciences and mathematics, and other; χ^2=11.2; df=12; p=0.511). The probable reason for this is that students of all study years have the goal to finish their studies, with a more general, not specific vision of what might be necessary for their work. Regardless of their parents' highest level of formal education, students report to have similar plans for their further formal education (various studies or postgraduate studies; related to fathers' formal education: χ^2=0.15; df=2; p=0.928; related to mothers' formal education: χ^2=0.88; df=2; p=0.643), non-formal learning (foreign languages and diverse, unfocused plans; related to fathers' formal education: χ^2=1.29; df=2; p=0.524; related to mothers' formal education: χ^2=0.16; df=2; p=0.924), and informal learning (foreign languages, art, social sciences and humanities, natural sciences and mathematics, and other; related to fathers' formal education: χ^2=9.41; df=8; p=0.309; related to mothers' formal education: χ^2=6.42; df=8; p=0.60). Also regardless of their family's monthly income, students express similar plans for their further formal education (various studies or postgraduate studies; χ^2=5.99; df=4; p=0.20), non-formal learning (foreign languages and diverse, unfocused plans; χ^2=3.29; df=4; p=0.51), and informal learning (foreign languages, art, social sciences and humanities, natural sciences and mathematics, and other; χ^2=18.6; df=16; p=0.289). It is very likely that students' population is already selected by higher parents' formal education and monthly income which makes them a more homogenous group. Previous research documented a strong influence of social selection of university students in Croatia (Bjelajac & Pilić, 2005; Ilišin, 2009).

Students' plans for future non-formal and informal teaching

In order to answer to the second objective, again chi-square tests were performed. Students report more about their plans for informal (21.2%), and less for non-formal teaching (11.4%). Significant differences are found related to plans for informal teaching. One is found among different study groups (χ^2=19.80; df=10; p=0.031). Although students of all study groups dominantly plan to give one to one lessons (70.4% of humanities students that answered this question, 57.8% of students of educational sciences, and 47% of students of economics), their second choice differs: future pre-school and primary school teachers (13.3%), as well as humanists (11%), are less focused in their plans (example of answers: *According to circumstances; If there is need; When I need money; Everything that I'm good at; Free time activities*), while the students of economics (23.5%) prefer teaching social sciences (psychology, economics). It may be that students of economics are more oriented towards concrete plans, especially on the labour market. On the other hand, future teachers maybe feel or expect that their education and experience provides them with a variety of competences for teaching. The next significant difference is found related to the study year (χ^2=37.6; df=15; p=0.001). Again, students of all study years prefer to give one to one lessons. However, these plans vary across study years: these plans are more articulated on the first study year, with decline towards the higher study years. At the beginning of the study maybe students see one to one lessons as a good opportunity for a financial support, but towards the end, they are more oriented to finishing their studies and finding a job, so their intentions for one to one lessons decrease. The third significant difference is found in plans for informal teaching regarding students' fathers' formal education (χ^2=18.4; df=10; p=0.048). Although regardless of father's formal education, students mostly plan to

give one to one lessons, but among them more plans to do so have those students whose fathers have finished the lowest level of formal education. The explanation for this could be that being able to give one to one lessons contributes more to the sense of achievement for students with lowest formally educated fathers than for students whose fathers have higher formal education. The difference can also be found in the areas of one to one lessons. Students whose fathers have finished highest formal education would like to teach social subjects, students whose fathers have finished high school education – other subjects. Possible explanation is that fathers with highest education have more interest in social subjects, while the high school education, mostly present in this sample (as well as in the country) is more diverse so their children have more diverse and less focused plans.

Other comparisons do not reveal any significant differences. Students of educational sciences, humanities and economics have similar plans for non-formal teaching (foreign languages, art and other unfocused plans; χ^2=5.11; df=4; p=0.276). It could be that they do not expect a safe job on the labour market, so they probably expect to find temporary or part-time jobs in various non-formal contexts, regardless of their profession. Students have similar plans for non-formal (foreign languages, art, social subjects and other; χ^2=6.34; df=4; p=0.175) and informal teaching (foreign languages, art, one to one lessons, and other; χ^2=3.11; df=4; p=0.540) although they have different levels of knowledge about formal education, non-formal and informal learning. Students of every study year identify similar plans for their further non-formal teaching (foreign languages, art, social subjects and other; χ^2=9.43; df=9; p=0.399). They probably see the sense of non-formal teaching, but they will decide about it after they graduate. Regardless of their parents' highest level of formal education, students report to have similar plans for their further non-formal teaching (foreign languages, art, social subjects and other; related to fathers' formal education: χ^2=11.40; df=6; p=0.077; related to mothers' formal education: χ^2=9.81; df=6; p=0.133). The same situation was found with students' plans for informal teaching regarding their mothers' highest formal education (χ^2=11.7; df=8; p=0.167). Also regardless of their family's monthly income, students expressed similar plans for their further non-formal (foreign languages, art, social subjects and other; χ^2=12.4; df=12; p=0.417) and informal teaching (foreign languages, art, one to one lessons, and other; χ^2=8.27; df=12; p=0.764). The same reason can be applied here as for the learning plans regarding parents' education and monthly income. Because students' population is very likely already selected by higher parents' formal education and monthly income, they differ less among each other.

Few limitations of this research would be worth mentioning. Parents' education was focused only on their formal education. For a broader picture, their non-formal and informal learning background would be useful to be analysed. As it was already elaborated, monthly income and parents' formal education span was narrow, so it cannot provide generalisation of results.

Conclusion

Educational institutions have a major role in preparing and encouraging students for lifelong learning. It is expected that this should contribute to a better knowledge based society (Cendon et al, 2009) and facilitate social inclusion (European Commission, 2010).

Although less than 30% of university students in this research mention plans for their further formal education, non-formal and informal learning and even less (than 20%) for teaching, they mostly do not differ significantly in their choices. They mostly choose rather general areas of learning or improvement (e.g. foreign languages) than specific areas, and in the case of teaching they mostly rely on their current knowledge planning to offer one to one lessons.

Obtained results contribute to the model of formal education, non-formal and informal learning (Coombs & Ahmed, 1974; European Commission, 2001) by identifying how study group, study year, knowledge about formal education, non-formal and informal learning, parents' formal education and income are or are not related to students' future plans for learning and teaching.

From the perspective of lifelong learning promotion, it is crucial to raise awareness, inform and educate university students about types of education and learning and the opportunities they can bring.

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SİBEL BURÇER

ASSESSMENT OF THE IMPLEMENTATION OF THE ERASMUS PROGRAMME IN TURKEY THROUGH THE EXPERIENCES OF FOREIGN STUDENTS VISITING TURKISH HEI'S

Abstract

The aim of this paper is to study the implementation of the ERASMUS programme in Turkey from the perspective of the foreign exchange students. The author conducted a survey which included 112 respondents from 8 Turkish universities. In the survey, the respondents assessed the level of language competence, the existence or the lack of sufficient international atmosphere, the efficacy of the administration, and the possibility of experiencing some type of cultural bias at the Turkish universities. The largest problem faced by the respondents was the lack of preparedness on the behalf of the Turkish teaching staff and the administration to communicate in English language. A lack of the international atmosphere within the Turkish higher education institutions as well as administration problems were among the major problems faced by ERASMUS students in Turkey.

Keywords: ERASMUS, international student mobility, Turkish higher education

Introduction

It has been more than a decade since Turkey became an equal partner in the ERASMUS programme. It was exactly in 2004 when the country joined the EU Community programme and when its higher education institutions largely began to participate in ERASMUS exchanges. The following years witnessed an even broader participation of the Turkish massive higher education sector in international student mobility. After the Lifelong Learning Programme was initiated in 2007, 129 Turkish HEI's have been granted the Erasmus University Charter, according to which they were all enabled to take part in the ERASMUS activities. During the period of six academic years between 2004 and 2010, the Turkish HEI's have sent abroad about 30,000 outgoing students and 6,500 members of the teaching staff, and have managed to attract approximately 9,000 incoming students and 4,300 foreign teaching staff members (The Centre for EU Education and Youth Programme, 2010, p. 5). Furthermore, in the academic year of 2012/2013 alone, Turkish HEI's were able to send 14,412 outgoing students and receive 6,145 incoming ones through the ERASMUS programme (European Commission, 2014). These massive numbers of incoming and outgoing students, as well as teaching staff members, show that Turkey has taken an active role in using the possibilities that the ERASMUS programme offers.

Regardless of the large quantity of ERASMUS mobile students and staff who have visited Turkey through ERASMUS, the country has faced many problems related to the programme. Corruption is one of the major problems. In 2014, the European Commission launched an investigation over the assertions about illegal activities concerning the EU Ministry's National Agency that resulted with Turkey

being under the threat of losing the funds for the ERASMUS+ programme (Today's Zaman, 2014). Due to the perception of Turkey as a closed and corrupted society that lacks transparency, it is hard to convince foreign students to choose it as a destination country for international student mobility (Oğuz, 2014, p. 119). Researchers have pointed out some of the frequent issues related to the implementation of the programme in this country. In general, the most frequent problems that ERASMUS students experienced during their study stay at a foreign university were problems related to accommodation, finances, and bureaucracy (Vossensteyn, 2010, p. 33). Furthermore, previous studies have shown that a common problem faced by ERASMUS exchange students was the lack of sufficient foreign language skills (Tekin & Gencer, 2013; Souto-Otero et al, 2013; Zhelyazkova, 2013).

In the context of Turkey, the deficit of foreign language competence among the teaching staff has had a negative impact on the incoming students. As pointed out in the report made by the European Stability Initiative (2014), incoming students who have enrolled in programmes that are taught in a foreign language have often faced the situation in which the Turkish professors, instead of teaching in English, have taught the classes in Turkish language, due to the realization that the Turkish students in their class were not able to follow the lectures in English language. Furthermore, the report states that incoming students were also advised that it is not necessary to follow the lectures and that they only need to submit their papers at the end of the semester (European Stability Initiative, 2014, p. 13). In another study that researched the problems faced by ERASMUS students who were studying in Turkey, 50% of the respondents answered that they have faced serious lack of English language knowledge even among the students (Keles, 2013, p. 1521).

In terms of bureaucratic issues, visa requirements might also play a significant role in attracting or deterring foreign ERASMUS students to the host universities. Turkey is not part of the European Union, and thus, most of the students from the European countries are required to apply for visa at a Turkish consulate in order to be able to realize their study stay in the country. More precisely, the incoming students are required to obtain a visa, costing 60 Euros, as well as to pay a fee for a student's residence permit costing about 65 Euros. To make this procedure easier, the Turkish government introduced new regulations that apply to visiting students from 2 of the participating countries in the ERASMUS+ programme, according to which they can enter the country without a short-stay visa, and later apply for a residence permit in Turkey. Regardless of the above stated, problems were faced by incoming students in relation to the application for a residence permit. For example, ERASMUS students who were studying at universities in Istanbul had to wait for several months after making the application for the residence permit, during which they were not allowed to leave the country (European Stability Initiative, 2014, p. 21).

The aim of this paper is to study the assessment of certain aspects of the implementation of the ERASMUS programme in the country from the perspective of the foreign ERASMUS students who are studying in Turkey. These aspects include the level of language competence, the existence or the lack of sufficient international atmosphere, the efficacy of the administration, and the possibility of experiencing some type of cultural bias. The research of the experiences of the

foreign mobile students in Turkey can be considered as an indicator for the major obstacles that the Turkish HEI's face in the process of the implementation of the programme.

Methodology

For the purpose of studying the implementation of the ERASMUS programme in Turkey through the experiences of foreign students visiting Turkish HEI's, the researcher implemented a qualitative research strategy. The author conducted a one-shot survey consisted of open-ended questions among a sample of foreign exchange students that are currently studying at different Turkish higher education institutions through the ERASMUS programme. For this purpose, the author selected a random sample of 112 respondents from 8 Turkish universities. The universities ranged from large higher education institutions such as Istanbul or Marmara universities, to small ones such as Afyon Kocatepe University. The only exclusion criterion was the condition according to which the respondents had to be studying in the country for at least two months. This criterion was set to assure that the respondents have acquired a minimum level of experience of how the ERASMUS programme is implemented in Turkey, and are able to form an informed opinion according to their own personal experiences. Excluding the more general ones, the questions in the survey were divided in four thematic categories. The first one addressed the issues related to language, such as experiences that involved insufficient levels of English language competence of the teaching staff and the university administration. The questions in this category also addressed the relation of this issue to the academic achievements of the incoming students. The second category of the questions involved experiences about the presence or the lack of international atmosphere at the host university in Turkey, including the issue of socialisation with the domestic students. The third category of questions was focused on the possible experiences of administrative problems such as acquiring the permit of residence, as well as suitable accommodation. The last category was addressing the possible experiences of cultural differences in the practices of teaching or administration staff at the Turkish host universities.

Results and discussion

The lack of sufficient level of English language competence of the teaching and the administration staff might represent a serious setback in the implementation of the ERASMUS programme in any national higher education system. The answers of the participants in the survey revealed serious problems considering this issue. More than half of the respondents, more precisely 68, responded that they have experienced serious problems related to insufficient English language competence of the teaching staff at the Turkish universities. The answers of the respondents indicated that while some members of the teaching stuff had a moderate level of English language command, others were not able to communicate even at a basic level. As stated by one of the respondents from the Afyon Kocatepe University:

> *I have to admit that most of the teaching stuff does not speak English well or does not speak English at all. It is totally unacceptable for exchange students who cannot speak Turkish themselves.*

In effect, this problem reflected on the quality of the lectures and, in minor cases, on the achievements of the incoming students. As one of the respondents answered:

> *I could not choose a subject that I wanted from my department because of the English competence of teachers, so I had to choose subjects not so related to my field.*

The same problem was noticed in some segments of the administration staff. 36 of the respondents stated that they have faced communication problems with the administration staff due to their lack of English language competence. As one of the respondents said:

> *For several times I had to ask my Turkish student friend to accompany me when I had some errands to attend to with the administration at my university, since the employees were not able to answer my questions in understandable English language.*

On the other hand, the international relations office staff was generally positively assessed by the respondents in terms of their English language competence. Only 6 respondents have said that they have faced language barriers in this segment. These were mostly minor problems caused by misunderstandings between the staff and the foreign students.

In general, English language incompetence was noticed by the respondents in other areas of the university. As stated by a respondent:

> *On the whole, it is not easy to communicate in English outside the international office staff. English knowledge is not common in Turkey.*

Creating a suitable international atmosphere at the universities which are part of the ERASMUS network represents another important asset for the successful implementation of the programme. The answers of the respondents in this section of the survey were substantially divided. 50 of the respondents answered that they consider that they have not experienced high levels of international atmosphere at their host university. On the other hand, out of the 62 respondents who answered positively on this question, 34 said that there was a high level of international atmosphere. One of the reasons for the polarised opinions of the respondents might be due to the size of their host university. After a closer analysis of the retrieved data, it was revealed that the positive assessments came from the ERASMUS students who were studying at larger universities such Istanbul, Ankara, and Marmara, where there is a large number of incoming students and already stable infrastructure for international student mobility. The negative assessment in this section came from the students visiting smaller universities. As one respondent answered:

> *In my opinion, the main reason why I find that there is a lack of international atmosphere at Afyon Kocatepe University is that the city and the university are small.*

Organising events aimed at the socialisation between the foreign and the domestic students might also contribute to increasing the level of international atmosphere at the host university. 10 respondents answered that they have encountered a lack of such events at their host institution. Some of them were not at

all able to take part in such activities at their host universities. As stated by one respondent:

> *I think there should be organised events for exchange students and Turkish students to become acquainted with each other, in my university there were not any.*

Another respondent stated that that "university students' organisations for different free time activities were not open for Erasmus students".

Most of the reported problems in this area were related to the language barriers on the hand of the domestic students. About 27 of these respondents said that the lack of socialisation with the Turkish students was due to their low level of knowledge of English language. As noted by one of the respondents:

> *A lot of students did not know proper English and were afraid to make a contact.*

Administrative problems, such as difficulties in acquiring documents needed for the application process, can also be considered as occurrences that reflect negatively on the normal functioning of the ERASMUS programme in the Turkish higher education system. In this regard, a minority of 10 respondents answered that they have faced problems in acquiring a residence permit. The problem faced by these respondents was similar to the one mentioned in the introduction. Namely, they were forced to wait for more than two months after the application for the residence permit to be processed by the Turkish authorities, during which they were not allowed to leave the country. One respondent stated that it took three months for him to acquire the residence permit. More experienced participants in the programme said that the situation has worsened in the last couple of years. As stated by one such respondent:

> *In 2012, there were no such big problems as there are now when I must have quite more paperwork to do and money to spend in order to get a permit. Rules are changed, and it is now harder to become a student in Turkey.*

Other problems that were reported by the respondents derived from the inertness of the administration of the Turkish universities in supplying information about the necessary documentation for the application processes. As stated by one respondent:

> *I had to wait for an entire week for an answer from one of the universities in Turkey where I wanted to apply for my ERASMUS exchange. This was very stressful since the deadline for the application was getting nearer. I was afraid that I will not be able to send my application in time.*

Furthermore, receiving information and documents during the studies was also negatively assessed by 15 respondents. As stated by one of the participants:

> *Receiving necessary information and documents from the academic staff takes a long time, and the overall bureaucracy is very time consuming.*

Problems with receiving a suitable accommodation during the studies were reported by 22 respondents, while the rest were generally satisfied with the accommodation they were presented with. The respondents who answered negatively, however, were able to find alternative accommodation in private apartments, since the grant money that they received from their national agencies

was sufficient for making such an arrangement. The most cited disadvantage of the provided accommodation was the over-crowdedness, the lack of sufficient numbers of available reading rooms, as well as the problems with transportation from the dormitory to the university. Nevertheless, several respondents stated that these issues were a consequence of the differences in living standards that exist between Turkey and the more developed European countries.

Finally, regarding cultural differences and bias toward the exchange students, no major problems were reported by the respondents. Minor problems such as differences in the starting dates of the semester, as well as the exam dates, were reported as an issue by the respondents. The general attitudes of both the teaching staff and the administration were positively assessed by the vast majority of the respondents. Only one female respondent answered that in some cases she found the attention of male staff towards herself inconvenient.

Conclusion and recommendations

As presented in the results section, the largest problem in the implementation of the ERASMUS programme at the Turkish HEI's is the lack of preparedness of the teaching staff and the administration to communicate and give lectures in English language. Both the teaching staff and the administration have displayed lack of sufficient levels of English language knowledge, which represents a serious obstacle in the implementation of the ERASMUS programme at Turkish HEI's. In this regard, it is recommended that the Turkish national agency should pay a special attention to the language level of the teaching staff and the administration, as well as provide English language courses in order for their language level to be improved. It can be concluded that the lack of international atmosphere at some of the Turkish universities is yet another problem that reflects negatively on the experiences of the incoming students. This is not, however, the case at larger Turkish universities which have been able to create a suitable atmosphere for international students. It is recommended that the international relations offices engage in organising a larger number of cultural events in which the incoming students will be able to socialise with both other foreign students and the domestic ones. As far as administrative issues are concerned, there should be further reforms in making the administrative process easier for the incoming students. Furthermore, the administration should be more agile in the communication with the potential nominees who are aiming to study at Turkish HEI's.

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TEACHERS' PERCEPTIONS OF CULTURAL DIFFERENCES: ETHNOCENTRIC AND ETHNORELATIVE WORLDVIEW IN SCHOOL CONTEXT

Abstract

In Serbian context many of the teachers are faced with a challenge of diversifying classrooms regarding the cultural background of the students. According to intercultural theory the way that people perceive cultural differences and their competence to effectively act in situations that involve different cultures is influenced by the intercultural sensitivity of a person. The main aim of this research is to answer the following questions: a) what kind of meanings participants assign to the notion of cultural difference; b) how do they perceive their professional and personal experience with cultural differences; c) how do they approach the teaching process in relation to perceived differences; and d) whether and in what way do they support minority students. The methodology for the presented research is structured according to the concept of Grounded Theory. For the purpose of this research, eight semi-structured interviews were carried out. All the data was analyzed by content analysis. The analysis of two different cases − ethnocentric and ethnorelative worldview translations to the school context are presented in details and discussed.

Keywords: teachers, cultural differences, intercultural sensitivity

Introduction

Providing high quality education for students of different cultural, religious, ethnical background, language, socioeconomic status or other characteristics is one of the most important principles of multicultural education (Nieto, 2000; Gorski, 2009). This basic principle is incorporated in Law on the foundation of the education system (2009) in Serbia. The results of some research conducted in Serbia indicate that some of the minority groups are not included to the full extent into education system and in this respect the Roma minority stands out. Some authors emphasize that there are additional barriers for the educational inclusion of the Roma students, such as low expectations of the teaching staff regarding the fulfillment of high academic achievements (Baucal, 2006; Macura-Milovanović, Gera & Kovačević, 2010), lowering criteria in the process of grading (Baucal, 2006), insufficient fluency in Serbian language and the lack of possibility for education in their mother tongue (Macura-Milovanović, Gera & Kovačević, 2010). Every tenth pre-service teacher from the University of Belgrade believes that the Roma themselves are responsible for their poor position in the society, and one fourth of them do not see any form of discrimination towards Roma minority (Petrović, Vukičević & Kostović, 2010).

Teachers have the key role in the process of implementing educational strategies and policies into the educational practice. In the field of intercultural education there aren't many researches that are directed towards exploring the teachers' attitudes, beliefs and similar concepts regarding cultural differences in their classes. Certain

consensus has been achieved in this research domain about the following: students of the teaching faculties enter their studies with previously formed beliefs that are based on their own schooling experience; the beliefs teachers have are very resilient to the change; they adopt information that are consistent with their current beliefs, and to reject the incompatible ones (Kagan, 1992; Kane, Sandretto & Heath, 2002); the beliefs exist in the implicit and silent form and are hard to articulate (Kane, Sandretto & Heath, 2002).

Results of the research of teacher competencies in Serbian context suggest that teachers place high importance on competencies relating to equality, supporting the learning of all pupils and the promotion cultural diversity in the broadest sense (Pantić & Wubbels, 2010). Another research in Serbian context concerning the issue showed that teachers themselves emphasize following competencies as central for inclusive education: positive attitudes towards inclusion, tolerance, and understanding of differences, capacity to create a pleasant and positive atmosphere in the class or group, beliefs that every child can learn, high expectations from students from minority groups and continuous research into efficient methods of cooperation with parents (Macura-Milovanović, Gera & Kovačević, 2010). The questions regarding the factors that influence acquiring the competencies as well as the translation into teaching practice still remain unresolved.

According to the intercultural theory the way that people perceive cultural differences vary depending on the intercultural sensitivity of a person. Developmental model of intercultural sensitivity defines the qualitative change of the one's experience dealing with cultural differences along the continuum ethnocentrism − ethnorelativism (Bennett, 1986). Ethnocentricity refers to the phenomenon that those beliefs and behaviors that are adopted through primary socialization are not being questioned and are perceived as the reality rather than an interpretation of reality; it also refers to the different ways of avoiding cultural differences. In the case of ethnorelative worldview a person realizes that one's beliefs are only one of the possible ways to organize the reality (Bennett, 1986, 2004). The product of typical monocultural socialization is denial, which reflects the disinterest of a person towards cultural differences that are being overseen and avoided in the process of selective perception (Bennett, 1986, 2004). In the stage polarization people are capable of perceiving certain cultural differences, but the categories formed in that process are too general and lacking the essential understanding of the values and the influence of the context in which more obvious differences appeared. The stage of minimization in Bennett's model is characterized as the last stadium in ethnocentric view of reality, although in some of its manners it significantly overcomes the typical ethnocentric phases (Bennett, 1986). The main characteristics of minimization are reflected in the fact that a person perceives cultural differences on a more sophisticated manner in comparison to the previous stages, developing more specific cognitive categories and assigning humanity to all people. On the other side, in this stage a person perceive differences among people as minimal and even trivial, overstating the similarities and universal features of different phenomena (Bennett, 1986, 2004). Acceptance of cultural differences characterizes perceived as just one of the equally complex worldviews. One is capable of constructing generalized categories and contrasts among cultures which reflect deep cultural differences. Adaptation refers to the stage in which one's

worldview is expanded to include the relevant constructs from other cultures (Bennett, 2004).

Methodology and sample

The methodology for the presented research is structured according to the concept of Grounded Theory (Glaser & Strauss, 1967), following mainly qualitative approaches. The main method of collecting data was the semi-structured in-depth interview. The main goals of the research were to determine: a) what kind of meaning that participants assign to the notion of cultural differences; b) how do they perceive their professional and personal experience with cultural differences; c) the manner in which they approach the teaching process in relation to perceived differences; and d) whether and in what way do they support their minority students. The interviews were transcribed and the content was analyzed according to Mayring (2014).

The sample in this small scope pilot research consists of eight teachers from two primary schools in Serbia. The schools have been chosen according to the criterion of the heterogeneity of the student population, among which the most numerous are students of Roma, Hungarian and Slovakian minority groups.

Findings

We will expound two cases that, according to our understanding, reflect the differences in the manner in which the teachers can perceive cultural differences and relate to the differences that are present in the classrooms. The first case could be considered as representative for the most of the conducted interviews since the analysis has shown that the worldview of the most of the teachers participating in this research could be characterized as ethnocentric. In the second case the worldview of the teacher is more ethnorelative and it represents unique perspective upon a subject matter.

Teacher 1

When it comes to perceiving cultural differences this teacher understands that the term itself only refers to the most obvious differences, such as the physical appearance in the case of Roma cultural group.

The differences that are perceived within the school context are limited to observations that Roma students do not attend the lessons regularly. The reasons of this phenomenon are being assigned to the low socioeconomic status of their families, disinterest of their parents or inferior values.

> *I wouldn't connect it with that, maybe when I compare the Roma families, there is the social status, and they have a lot of kids, so maybe the school is not that important in these families. It seems to me that it isn't... is it the parents' awareness; they think it's not all that necessary, or I really can't understand.*

Roma child is invisible in the school context, unlike the Hungarian or Slovakian children. The teacher comments the presence of the Roma child in her class only after being asked explicitly. In this case a particular child is perceived as an exception when it comes to stereotypical perception of the Roma cultural group.

I don't. I mean, I do! I do have... he is so nice; I think he is a bit different from, from, from that group you call Roma. Somehow, he's so cute and lovable and he's not aggressive at all. And he is intelligent; I don't think they are not intelligent, far from that. But there is no nuisance with him. I don't separate him at all.

Cultural differences in the case of the Roma cultural group are perceived only as an obstacle and a deficit of a particular child. For the teacher this represents a necessity for investing an additional effort in a process of making a lesson plan.

You will definitely agree that working with Roma children is special. If nothing else, it's because they don't do their homework, or they do it very rarely. And then of course you have to separate them in some... You have a child that doesn't belong even in the first grade, because nowadays children come to the first grade half literate or literate. And then you have the lesson inside of a lesson.

The mother tongue of the minority children that is different from the majority cultural group language is taken into account only in the case of Hungarian and Slovakian children. It is perceived as a challenge when it comes to maintaining good social relations in the class as well as the achieving educational outcomes, which results in lowering the expectations and the criterion.

The first mistake they make when speaking Serbian is that they don't have different genders. He stood up, for example. And he said something and everybody started to laugh; I just said, well, how should he say it, help him so he wouldn't make that mistake the second time.

She made all the possible mistakes in her essay; there you couldn't find two grammatically appropriate sentences in total. I gave her another opportunity; it was much better but not nearly as some other essays of other excellent students but I gave her an excellent grade.

Teacher 2

There is a significant shift in frame of reference of the second teacher in comparison to the above presented world view. The way of perceiving cultural differences of the second teacher is more ethnorelative − resulted from the experience with the members of different cultural groups, personal as well as professional. Cultural differences are perceived on the level of customs and language, but also in terms of the cultural values. The differences are perceived as desirable and interesting as well as an opportunity and learning potential.

First thing that comes to mind are the differences regarding the mother tongue. Most of the children around here come from the mixed marriages, and then one of the parents insisted that the child should learn Hungarian. It was interesting. I think that it is an advantage. Because you have, as I like to say, you have two open windows. You can always choose whether you will continue your schooling in this or that language.

The differences that are reflected through the context of teaching process represent the ramified observations about the best approach in working with these children. Thus the differences in religious affiliation are perceived as something that needs to be respected. The teacher expresses a tendency to shift her perspective as a

majority group member and imagine the way that children as well as their parents could perceive dominant group cultural practice incorporated into the school practice.

> To celebrate Sveti Sava, every year we prepare the play for parents and I wonder. There are Catholic and Muslim children, how do they experience all of that... We always include some part of the programme in Hungarian, Slovakian and Roma... I find it important that they should feel special and, that the play belongs to them too.

The teacher attempts to understand the position of the Roma parents and the feelings of the children that are absent from school, as well as the respect of the family values. At the same time this teacher is making an effort to support this particular child and improve the academic achievement.

> There was a boy, a Roma boy, who travelled somewhere abroad every once in a while with his parents so they could work there. I called them to have a talk with them, since I was told that the grandfather is the head of the family, I called him. We had a nice talk. I realized that it was hard for them to be apart, it was hard for him. It is very important to me to have the opportunity to work with him, even after the lessons, if necessary. We made the deal, and so it was.

The cultural differences are perceived as learning and teaching opportunity rather than an obstacle when it comes to working with the heterogeneous population.

> And then one student told me that he celebrates slava as well. When I asked him which slava was his he said it was the Holy Hungarian... It was so important to him not to be different from the others; it was surely the pressure for him.

> So I took them, we have Kirvaj that the local Hungarians celebrate, there by the church. I they should see what the riches that is, that they live so mixed up.

The teacher is critically reflecting upon her attitudes and perception of the minority group (Roma). She expresses the tendency to reflect the factors that could have been influencing her beliefs regarding this minority group.

> I used to have very poor opinion of Roma people, I had my prejudice. Then I got to know them a bit better. When you approach them in the right way, when they feel that you respect them, that you want to understand them, then they relax.

> Our parents told us not to sit with them, that they are dirty and that they would take something, steal. In reality this is just a fear of something that you are not aware, you do not know and then you have prejudices.

Discussion and conclusion

Most of the participants in this study expressed their understanding of the cultural difference in the way that could be characterized as an ethnocentric according to Bennett. The first presented interview illustrates the tendency of the teachers to perceive differences in a polarized way, and this worldview translates

through some specific concerns of the teacher in the school context. The teacher perceives only the superficial and obvious differences among the class members. The differences are connected to the obstacles and difficulties in teaching and learning process, which is the most obvious when there is language of the minority groups in question. The parents as the representatives of the minority cultural group are perceived as responsible for transferring appropriate values to their children and influencing school achievement. The perception of the teacher is different depending of her estimate of the potential commonality of values of minority groups with the values of the majority. The second interview illustrates the more ethnorelative worldview translation into context of schooling. The teacher perceives cultural differences in a more sophisticated and elaborated way, explaining the ways how these differences could be used as a learning opportunity for all the students. In a context of working with heterogeneous population she is demonstrating a tendency to take the perspective of minority students into account.

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TUTORSHIP AND ACADEMIC TRAJECTORIES IN SCHOOL: COMPARATIVE STUDY IN TWO PUBLIC UNIVERSITIES IN MEXICO

Abstract

This work reports on the results of research on modalities of mentoring in the area of social sciences at two Mexican universities and their relationship with the academic trajectories of their students. The analysis focuses on the need to identify influences of different mentoring forms on students' academic performance. The theoretical guidelines are linked to studies on tutoring and academic performance. The method was quantitative, with representative samples collected from students of 8 programs, of the Institute of Social Sciences and Humanities of the Autonomous University of Hidalgo State (UAEH) and 3 programs of the Faculty of Pedagogy and Educational Innovation in the Autonomous University of Baja California (UABC). The results provide significant data that show a positive correlation between tutoring and academic paths. It reflects the strengths and weaknesses in the emotional and academic aspects of tutorship and their impacts on student training in each program. We considered for the analysis, the type of tutoring in each program, teachers who developed it and the interaction that occurs in the process. It is concluded that the result of the study provides an important tool for the planning and development of educational strategies suited for the students of different programs of social sciences and humanities in improving their key skills for professional development.

Keywords: academic tutoring, mentoring, academic trajectories, higher education

Introduction

The economic dynamics that arises with the processes of globalization and integration of commerce blocks in recent decades responds to the rapid advance of science, and technology by influencing the ways to produce knowledge in economic, political and social spheres. This new scenario challenges and demands a more quality higher education. The training of human resources to improve the academic performance of the student population is a priority for the most of the governments; students must have tools to face multiple challenges in all areas of knowledge.

This scenario demands the development of life skills in college students to be applied in a society that changes continuously. The demands of the current student require educational services that are differentiated according to their needs, training trajectories and aspirations. Thus, the personalized mentoring assumes an important role in the integration of the student sector to university studies and the improvement of learning conditions (Canales, 2010).

Reforms in higher education offer the possibility to involve the students in the solution of real problems. They reflected the need to transcend the concept of cookie-cutter school learning and mastery of abstract knowledge in one disciplinary field. This is a reductionist position that has permeated the teaching practices from

the last century. Higher education emphasizes student focused teaching and flexible programs to suit different learning needs of students (Rogers, 1986).

The changes that have occurred in the XXI century have made a clear impact on the lives and works of teachers and university students, which can be seen in the everyday interactions in the classrooms. The overall objective of the study was to identify the influence of different types of tutorship received by students on their academic trajectories.

The article provides an overview of mentoring and academic trajectories of students, the method applied in the study and the most significant results. It concludes with supported considerations about the central topic.

Academic tutoring and academic trajectories

In the XXI century, mentoring has become a process between the tutor and the student to promote academic success from the time when the students enter the university until the time when they graduate. It implies a shared co-responsibility exercise, since the guardian has been companion implicitly or explicitly for almost all modalities of formal and informal educations throughout history. Guardianship (from Greek tutelage) etymologically means protection. Throughout history it has been used as a strategy to drive students from Confucius through Socrates, Plato, Lorenzo de Medici and Michel Angelo to Freud and Jung (Cruz de la, Chehaybar & Abreu, 2011).

In each Mexican institution of higher education, different tutorship models have been implemented. These are derived from the educational policy proposals nationwide to offer support to students. After 14 years after its formal implementation, it had been observed that the process of tutorship is a complex field, because it involves a qualitative and emotional dimension between the tutor and student. Tutorship promotes an educational alternative to developing teachers teaching in front of large groups (Canales, 2004). The teacher assumes the role of counselor and companion and the exercise of its authority is softened to minimum and thereby creating a more relaxed and friendly work environment (Latapi, 1988).

The Institutional mentoring programs aim at providing students with a tutor to accompany and guide them during their college journey. The goal is to contribute in their holistic development through the provision of services including tutoring, academic counseling, psychological care, medical care, vocational guidance, guidance on scholarships and preventive actions for the health of the students. The modalities of mentoring programs implemented at both institutions are:

- Mentoring group: to support the academic training of the students.
- Custom tutoring and/or individual: to attend students with academic and personal problems which require channels to different services.
- Mentoring between pairs: this is the peer support, which focuses on the advanced students providing information and guidance by transmitting its strategic knowledge for survival in university environment at personal level (UAEH, 2010).

We identified two types of mentoring in the UABC:

- Instructor-led process which involves in-person tutoring between guardian and the student.

- On line tutorship.

Academic trajectories

Each student in the study presents a specific behavior throughout its formative process, which begins from his transition from high school to university, and concludes with his graduation from the university. The entire educational system involves school culture that prevails in each student community. We noticed that students life style, material resources, experiences, ways of understanding the world and dealing with problematic situations facilitate the projection of their educational and subsequent career paths (Canales, García & Sánchez, 2013).

Method

We used quantitative method with a non-experimental, cross-sectional and explanatory design; data were collected in a single moment and with different groups to determine the main factors that are related to and influence the academic trajectories.

We used a simple random sample, so all students had the opportunity to participate. The population was chosen from students in the last semester of their school; 14% was considered because the number of students who reach this level is lower than in previous semesters. This was a mechanism for larger representation in every program. We recovered 209 questionnaires 8 departments of the UAEH Social Science and Humanities Institute and 100 from the UABC Faculty of Pedagogy, where the number of students last semester is higher than Hidalgo's university.

The sample of UABC focuses on teacher training in the areas of math, language and educational guidance. The students of UAEH, participated from 8 programs of the Social Sciences and Humanities Institute; they are Education Sciences, Communication Sciences, Law, History, English Language, Political Science, Social Work and Sociology.

Research question

How does academic tutorship influence the academic trajectories in strengthening the specific skills of students at the UAEH Social Sciences and Humanities Institute and in the UABC Faculty of Pedagogy?

Instrument

A Likert scale was used with a range from one to five, where one meant full agreement and five meant disagreement. The questionnaire was divided into three sections: a) general information; b) seven factors that represent academic trajectories; and c) three open questions.

This article is a report of the factor called Perception of mentoring, which consists of 14 questions that were correlated with the academic trajectories of the students involved in this study.

Results

Every undergraduate program at UAEH has a different form of academic tutorship, according to the number of students and professors. In four programs, students are under the tutorage of full-time teachers and hourly professors. In three programs, students are only under the tutorage of full-time teachers and, in one program, students are under the tutorage of full-time professors and hourly teachers. In English Language and Communication undergraduate programs at UAEH, students are under group tutorage every semester. In History, Political Science, Law, Sociology and Social Work programs at UAEH and in three programs at UABC, students are under individual tutorage every semester. At UABC, students have tutors and online tutorage service from the beginning of their education at the school.

The average grade obtained by students was divided into three ranges: From 7 to 8, from 8.1 to 9 and from 9.1 to 10. At the first range, 9.8% of UAEH students and 7.4% of UABC students were placed. At the second range 66.7% of UAEH students and 27.1% of UABC students were placed. Finally, at the third range, 19.6% of UAEH students and 65.6% of UABC students were placed.

Also, in both institutions, four types of academic trajectories were identified:

1) Students having more than two courses failed and the average grade of less than 7. Percentage of students placed in this trajectory were: 14.8% at UAEH and 4% at UABC.
2) Students with one course failed and an average grade between 7.1 and 8: 17.7% at UAEH and 3% at UABC.
3) Students with an average grade between 8.1 and 9: 49.7% at UAEH and 27.2% at UABC.
4) Students with an average grade above 9.1: 17.7% at UAEH and 65.8 at UABC.

Academic tutorship in Mexican universities is used as a strategy for academic improvement. For that reason, it is interesting to analyze the answers to the question of "*quality monitoring of students' academic trajectories*". The highest percentage of answers which is 85.8% comes from UAEH's undergraduate degree of History, followed by three undergraduate programs at UABC with 81.8%, Law undergraduate program at UAEH with 63.7% and the rest of UAEH undergraduate programs with 24.11%.

In customer service and emotional aspects, History and Social Work programs obtained the highest percentages: 86% and 100% respectively; UABC registered 92.9% in the following question: *During your academic tutorship, were you treated in a respectful and ethical way?*

On the issue of the contribution of mentoring with your development as a researcher, History program at UAEH obtained 87% and the other programs less than 50%; at UABC, this question obtained 60%.

In the question: Did tutorship improve communication with you? UABC scored 73%; at UAEH, Social Work scored: 100%, History: 86%, and Education: 69.3%.

At UABC, tutorship average was 66.2 while at UAEH was 42.8. At UABC's tutors are seen as companion, facilitator and mediator during their entire academic career. Difference between both universities is important, with 30% more students at UABC. An interesting fact could explain this difference: At UABC, students have

had academic tutors since the very beginning of their study, while at UAEH, tutorship is not regular and only 27.5% of students have had permanent tutorship. The answers to the questionnaires suggest a significant correlation between academic careers and tutorship.

Conclusions

The feedback to the questionnaire indicates the lack of information among students at UAEH's Institute of Social Sciences and Humanities about tutorship and how it is useful for their academic career. When the questionnaire of this research was created, individual tutorship was applied in six of the eight undergraduate programs included in this research. Students who have a government scholarship are the only ones that receive tutorship in a systematic way, in order to keep the necessary status for the scholarship. The results show that there is a difference between the guidelines written in school rules and students' opinions.

It is clear that in the undergraduate degree of History at UAEH, professors understand the meaning of being a teacher and being a school tutor at the same time, because it is an online career. For that reason, 85% of students that participated in the research stated they were treated in a respectful and ethical way, got monitoring of their academic career and always had a good communication with their professors. This behavior was also seen at UABC's College of Education, because all of the students have permanent tutorship during their academic career.

Being a professor and a school tutor at the same time means that professors should know what their students need in every one of their courses. In each undergraduate program analyzed, it seems that there is low concern about tutorship among students.

Tutorship is integrated with teaching, in order to do a proper monitoring to every group of students. A true professor leads the students' efforts towards their individual needs, makes them see the world from the point of view of their class, favors reflection and the development of critical thinking. For a professor all of above means that since the beginning of the course he should have good communication with every student, as well as develop confidence and respect from the students. Only professors at UAEH's History and Sociology undergraduate programs showed commitment and responsibility with their students with respect to activities in their academic environment.

This result is an important tool for planning and developing teacher training strategies in every undergraduate program, in order to promote students' skills required for their professional development.

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Part 5

Law and Education: Legislation and Inclusive Education, Child Protection & Human Rights Education

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WHAT ARE THE IMPLICATIONS OF TIER 4 UK IMMIGRATION RULES AND POLICY FOR NON-EU STUDENTS? THE EXPERIENCES OF STUDENTS FROM NIGERIA

Abstract

Changes introduced in 2010 to the Tier 4 immigration rules that apply to non-EU students wishing to study in the UK have led to a reduction in the overall number of non-EU students gaining entry to the UK. This paper outlines the reasons for these changes to the UK's immigration rules and explores the experiences of one group of non-EU students in relation to the new rules. Quantitative and qualitative research methods were used to capture the perceptions of 40 students from Nigeria on the impact of the 2010 UK Border Agency rules and policy on their experiences as non-EU students and on their career development. We suggest areas for reviewing the current policy that would improve the experiences of non-EU students, to enable them to maximise the undoubted opportunities of coming to the UK to study and acquire the British education that will enhance their job opportunities all over the world.

Key words: immigration, law, rules and regulations, non-EU students, career
            development

Context

The UK's points-based immigration system and Tier 4

In early 2008 the UK introduced the first phase of its new points-based immigration system. This is broken into five tiers: highly skilled migrants who come under the Exceptional Talent visa, entrepreneurs, investors, Tier 4 students and a few other categories of people (Immigration Matters, 2012). Students coming to the UK under a Tier 4 student visa require a university or other UK educational institution on the register of sponsors to sponsor them. They also need to score enough points to be accepted as an international student in the UK (UKCISA, 2015).

Tier 4 seeks to ensure that only those students who genuinely wish to take up study in the UK can come to the UK and only those educational institutions that are genuine and bona fide providers can continue to recruit non-EU students. Since the end of March 2009, non-EU students applying to come to the UK have been assessed under the new points-based system. Students must provide evidence of sufficient funds to pass a maintenance test, as well as any qualification certificates or other documents used to obtain an offer from the educational institutions. Educational institutions that sponsor non-EU students are required to comply with record-keeping duties, such as keeping copies of passports and up-to-date student contact details. Educational institutions are also required to ensure that students comply with the terms of their visa. Separately, all potential non-EU students must be provided with a confirmation of acceptance for study letter (University of Edinburgh, 2014). Since the introduction of Tier 4 there has been a decline in the numbers of non-EU students coming to study in the UK (The Migration Observatory, 2014; Universities UK, 2014).

The 2010 changes to UKBA student visa rules

In early 2010, the UK temporarily suspended student visa applications from non-EU students due to an apparent failure of the system which saw many visas being granted to individuals who did not meet the requirements of the UKBA rules and regulations. As a result, applicants for student visas now have to be able to demonstrate a higher level of proficiency in the English language than previously (HM Government, 2015). Previously there was no time limit for study at or above degree level for non-EU students coming to study in the UK. Going forward foreign students will only be allowed to study in the UK for three years at undergraduate level or five years at postgraduate levels (Smith, 2011; Gherson, ND).

UKBA announced that all current Tier 4 Sponsors, if they are not already subject to inspection or review by one of the designated educational oversight bodies, must apply to the appropriate body by the relevant deadline as detailed in the current sponsor guidance. These inspections and reviews were to take place throughout 2012, with the results of each inspection or review published on the website of the appropriate educational oversight body.

There is also a requirement that non-EU students who come to study in UK colleges and universities must be able to demonstrate the ability to cope financially whilst on the course, which has meant that more non-EU students are finding it difficult to study in the UK. The intention behind this rule under Tier 4 is to ensure recruitment of genuine international students only. These legitimate students are those who will bring economic benefits back to their home countries as their future skilled workforce, and who in turn are granted the best provisions the UK government has to give. This alteration of the Tier 4 immigration policy has obvious implications for the international students, effectively making it more expensive to study in the UK, and therefore preventing more genuine students from non-EU countries coming to study in UK institutions.

A further tightening of the restrictions on non-EU students was announced in early 2014 by Immigration Minister Damian Green, in relation to how long non-EU students can work in the UK after completing their degree programme. Previously students could remain for 2 years after their studies had finished under the Tier 1 PSW (Post-study work) route. But from 6 April 2014, a more 'selective' system was

introduced restricting the right to stay to international graduates who qualify under new rules. Only those who 'graduate from a university', and have a skilled job offer with a minimum salary of £20,000 (or more in some cases) from a reputable employer accredited by the UK Border Agency, will be allowed to continue living and working in the UK.

Case study: How the UK's Tier 4 immigration rules were seen by students from Nigeria

This small scale research study explored the experiences of one group of non-EU students in relation to the UK's Tier 4 immigration rules. It used both quantitative and qualitative research methods to capture the perceptions of students surrounding the rules and policy of the UK Border Agency and its impact on their career development, focussing on Nigerian students studying in the UK as a case study group. The research involved telephone interviews with 40 Nigerian students on 10 RSSB and 20 RSSDA scholarship and 10 private students studying in the UK. The majority of the respondents (20) were on engineering programmes or on degrees relating to work in the oil and gas industry (16), with a further 4 students studying for computing degrees.

It was universally recognised among the 40 respondents that gaining a degree from a respected UK higher education institution would significantly enhance their future employment opportunities. As one respondent commented:

> *I was motivated by my teacher to study in the UK. My university lecturer studied in the UK and I have always admired the way he spoke and the values he attached to the UK education system. He was a role model to all the students and taught us very well. I decided to do my Master's degree in the UK to gain a sound education that I believe will surely enhance my job opportunities in the world at large.* (S10)

However, this same student went on to caution that the path to gaining a degree in the UK is possibly harder now than it once was for non-EU students:

> *It is not easy. I am not sure that it was the same when my lecturer studied here. As a sponsored student without a job to support the money we get from the sponsor, it puts you off coming to study here. When you run out money, landlords will be on your neck, and there's nobody to cry to. Employers are not willing to employ you because of the Home Office restrictions and rules and penalty policy for employers. Yes, it's good to study here but be ready to face the hardship as a non-EU student.* (S10)

In most cases the respondents were sympathetic to the reasons behind the UK's points-based immigration system, but they felt that the many requirements now placed on students under Tier 4 were excessive. Several described the process of gaining admission to the UK as being "stressful" or "difficult". The following assessment was typical of the views on the ease of satisfying the Tier 4 rules and gaining admission to take up their hard-earned place to study at a UK university:

> *It was not easy. The TOEFL English test you have to take as a student with WASCE, despite the fact that my first language was English, is a hindrance to some students aspiring to study in the UK. The fact that we are classified as non-EU students means we still have to take the English test. Coupled*

with the evidence that you must have sufficient funds in the account and it has to be there for 48 days has made the process too stressful to apply to study in the UK institutions. I was almost sleeping in the Board's office submitting one document or another. I sustained the stress because I came on a Scholarship. Even when we arrived at the airport, we were still scrutinised and bombarded with questions. However, I am proud of coming here to study and really like the discipline of this country. The UKBA Tier 4 system is too rigorous for students and needs to be made easier to encourage more non-EU students to study in the UK. However, I still respect the law which prohibits illegal immigrants to crowd the country. (S18)

Even with the financial support provided by their sponsor, many of the students nonetheless found it a challenge to make ends meet once they arrived in the UK and started their studies. They also had to deal with additional paperwork associated with meeting UK Border Agency requirements. The following student said that overall they enjoyed studying in the UK, but that there were additional stress linked to being a non-EU student:

For me, the three difficulties faced since studying here are; stress of not getting a part time work to help my studies, the demands of the institutions as they are meant to comply with the UKBA rules and regulations which affect us, stress of rushing to submit one assignment or another in a short period to avoid exceeding your time limit in the UK. (S24)

The difficulties of gaining entry to the UK in the first place, allied to the additional pressures that these students experienced once on their courses, contributed to a feeling – expressed by the majority of the respondents – that non-EU students are not currently treated fairly by the Tier 4 immigration rules. Whilst all understood the rationale behind the rules, many pointed to what they saw as the unfair differences between how EU and non-EU students are treated. In the words of one respondent:

Obviously, there are good and bad aspects to the system. In fairness to the system, it does achieve its aim, which is a cap on the inflow of illegal immigrants into UK. It helps to control the population and is good for the welfare system. However, it seems unfair as it is mainly geared to non-EU immigrants who actually bring in wealth to the UK economy. Immigration control should include all countries. It should exclude those who have nothing to offer to the economy. Students should not be classified as immigrants as they have limited time to go back after their studies. Young people should be allowed easy access to education in the UK so that they can go back to their countries and be good citizens. (S27)

The best way in which to summarise the overall experiences of studying in the UK of the respondents in this study is to say that it was mixed. Whilst the respondents were generally very happy with the quality of the education they experienced in UK higher education institutions, they were dissatisfied with the hurdles and complications they encountered because of their status as non-EU students. A particular challenge for many was in surviving financially. As the following example makes clear, it can be extremely difficult for non-EU students to

work part-time to supplement their sponsor's contribution to the costs of living and studying in the UK:

> *Studying in the UK as a non-EU student can make you feel good when the going is fine but also sad when you cannot cope. Being my first time in the UK to study, my expectations were too high. The immigration rules and regulations I was confronted with were almost off-putting. I thought I could immediately get a part time job on arrival to support the money from my sponsor. I had to wait more than three months to get my national insurance number required by employers for me to work. When I finally got my NI, I applied for more than 20 jobs, but none of the employers were willing to employ me as a student. Some told me they wanted full time staff, but I knew it was not the case but rather the worries about breaching the immigration rules on a student visa.* (S33)

The operation of the Tier 4 rules, and the time restrictions on how long a student can remain in the UK, can also cause complications where a student's academic progress has not gone to plan:

> *My experience ranges from positive to negative. I came to study here in 2009 and was put on a foundation programme with my O-Level result which did not qualify me for direct entry into a university. I came on a Scholarship scheme and my award was linked to a specific course. I am not a science student but I took the offer and came over. The foundation course was tough due to Mathematics which I had to do to be enrolled in the Uni for Mechanical Engineering. I struggled on my programme for five years and exceeded my time limit. I had a module more to catch up. I was asked to go home to re-apply for completion. I just arrived and am now completing the course. You can see my negative experience. On the positive, I was allowed to come back to complete the course but it took me longer than I envisaged due to going back home and coming back again. People need to understand that there are slow learners and this law cannot apply to them if people like me are to achieve a British degree.* (S30)

In spite of all of the various challenges, the respondents felt that their ability to study in the UK had positively enhanced their career prospects. However, they were also very aware that they were the "lucky ones" and that there were many others from their country who could also have benefitted from a UK university education but were missing out because they had not satisfied all of the Tier 4 requirements.

Conclusions

This small scale study with 40 Nigerian students reveals that Tier 4 has had a major impact on the experiences of this group of non-EU students. The process of satisfying the many entry requirements linked to Tier 4, in order to take up their place to study in the first place, proved to have been a significant challenge for many of the respondents. Even once they arrived in the UK and commenced their course of study, their status as non-EU students put them at a significant disadvantage compared to home and EU students. Not only did they have to deal with additional paperwork from the UK Border Agency, but they found it difficult or even impossible to secure part-time work in order to adequately support themselves. For

some students, the restrictions on how long they could remain in the UK as a student caused problems if for some reason it was not possible for them to finish their programme of study within the intended timeframe. Despite their overall positive experiences of studying in UK higher education institutions, these students reported considerable additional stress and anxiety that stemmed directly from the hurdles and restrictions presented to them by the Tier 4 policy and rules. As such, their experience was more challenging than that of their peers from home and EU countries – something which they experienced as "unfair".

Not surprisingly, based on the above experiences, the respondents in this study had a number of suggestions for improving access to UK higher education for non-EU students. Some argued that this was only fair, given that many non-EU students would be using their skills in "helping to boost the British economy" (S3). Others felt that the unfairness of the Tier 4 system was in "singling out non-EU students" for different treatment compared to their EU counterparts (S18). A key area that many wanted to see improved was to make it easier for non-EU students to gain part-time work once they are in the UK. Some even went so far as to suggest that Tier 4 should be removed altogether and that there should be a return to the previous system for student visas.

It is a worrying conclusion from this research that non-EU students experienced ongoing difficulties linked to the Tier 4 requirements even after gaining entry to the UK. They have additional bureaucracy to deal with, they find it much harder to gain part-time employment and to financially support themselves, and there is little or no flexibility if they do not complete their course within the usual allotted time frame. All of this puts an additional stress and strain on these students, who are already having to cope with many other pressures by virtue of studying so far away from their home country. We recommend that the UK higher education authorities look seriously at these issues and work with the UK Border Agency to make the Tier 4 requirements less onerous in order to ensure that non-EU students have the same opportunities to succeed as students from other countries. This should include a review of whether the current support provided by universities to non-EU students – who after all are paying a premium for their education – does enough to help these students with UKBA requirements so that this is not to the detriment of their education and experiences in UK universities.

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SHADE BABALOLA

THE CHALLENGES FACED BY EASTERN EUROPEAN STUDENTS WITHIN A 16-19 EDUCATION SETTING IN THE UNITED KINGDOM

Abstract

To examine the challenges encountered by Eastern European students within a sixth form college in the United Kingdom. This paper aims to consider the difficulties encountered by this particular ethnic group examining the impact the challenges may have on their performance, success and achievement. This paper will also highlight equality and diversity implications and examine the social mobility of this particular group.

Key words: Eastern European, challenges, attainment, work ethic, European Union, equality and diversity implications, white other, perceptions, English Language, Mathematics

Introduction

This paper aims to examine some of the possible and potential challenges faced by Eastern European students within a 16-19 education setting. This paper will further examine the performance and outcomes of Eastern European students and their experience within a college setting. This paper will further address equality and diversity issues and discuss their impact on Eastern European students. The paper will finally set recommendations and strategies to improve the outcome of these students within the 16-19 education setting.

The college in focus is located in London within a borough categorised by high social deprivation; with a population of around 2,000 students aged between16-19; the prior attainment of students is lower than in many sixth form colleges in the United Kingdom. The ethnicity of students is extremely diverse, the predominant groups being African, Pakistani and of Bangladeshi heritage. However over recent years there has been a gradual intake of Turkish students and as more Eastern European countries have joined the European Union a steady flow of Eastern European students have migrated into schools and colleges in the United Kingdom.

Consequently, the number of white other (a descriptive term used to describe Eastern European Students and other groups classified as white), has risen from 240 in 2011 to 307 in 2014. This figure is set to rise due to growing changes in migration patterns.

Methodology

The study that this paper focuses on are the challenges and the educational experience of Eastern European Students within a 16-19 education setting. This paper seeks to shed some light on how their experience and challenges impact on their attainment and performance at college.

Data was gathered from participants at an English Speaking college in the United Kingdom in the form of statistical data, discussions, observations and

questionnaires that have been completed by 26 Eastern European students. Students who participated in the research were from countries ranging from Romania, Poland, Lithuania, Albania, Kosovo and Hungry. 4 teachers were also interviewed and completed questionnaires for the purpose of the research.

Literature Review

European Union

The European Union (EU) is an economic and political union of 28 countries. In May 2004 Czech Republic, Estonia, Hungry, Latvia, Lithuania, Poland, Slovakia and Slovenia joined the EU. In January 2007 Bulgaria and Romania joined the European Union increasing significantly the number of European migrants moving to settle into the United Kingdom.

Attainment

Department of Education and Professional Studies (2014, p. 11) point out that "the UK government benchmark at Key Stage 4 is for students to pass at least 5 GCSE's with C or better, including English and Maths, which in 2013 was met by 59.2 per cent of pupils across England".

However, in reality if Eastern European students in the United Kingdom wish to pursue a competitive career at a competitive university, and gain admission into a good college in the United Kingdom they should be aiming to achieve a B profile or above in their GCSE's, this includes a B grade in both maths and English. For some students of Eastern European heritage this may prove to be a hindrance for some students who are first generation Eastern European limited grasp of English Language. Many colleges in the United Kingdom now require a G'score of 5.5 before you can be accepted on to an A level programme. A G'score is calculated by averaging out the total percentage of your GCSE grade.

However, for students who do not achieve a b grade profile they may be accepted on to BTEC vocational programme, dependent on their grades they will be permitted to work towards either a level 1, 2 or 3 course. This qualification still enables students to pursue a university degree.

Department of Education and Professional Studies (2014, p. 11) point out that "pupils of Eastern European origins (as a group) performed below the national average in the 2012-13 academic year: 40.1 percent of pupils achieved 5 or more A*-C grades at GCSE or equivalent including English and mathematics GCSE. This is also lower than recorded attainment in other key ethnic groups except Gypsies, Roma and Travellers".

English Language

Department of Education and Professional Studies (2014) further argue that teacher's highlight English Language as one of the main challenges faced by Eastern European students, pointing out how English hinders the performance of these students not only in subjects such as English and humanities but notably in mathematics. They further point out "students feel that their status as an EAL learner could be a barrier to achieving success" (Department of Education and Professional Studies, 2014, p. 4).

Mathematics

Although students from Eastern European backgrounds often struggle with understanding and communicating in English Language, they also face similar

problems with interpreting maths questions which of course will be written in English Language in the United Kingdom. Before students are granted admission into college or an institute of higher learning it is important that they achieve as a minimum a C grade in Maths as well as a C grade in English Language, there are also alternative qualifications that may be considered by institutions as an entry requirement for maths such as FSQM a preliminary qualification before a GCSE in Maths is granted.

However, many universities are now reconsidering their entry requirements, many universities now require at least a b grade in maths for certain competitive courses.

Perceptions

An increase in the migration of many Eastern European Students into the United Kingdom has without a shadow of a doubt created tensions within some communities. In some instances many Eastern Europeans have been described as scroungers who have simply migrated to the UK to manipulate the welfare state. There have also been suggestions that increased migration of European nationals has placed a strain on schools and hospitals in the UK as well as the benefit system. In a recent article Robinson (2014) points out that Lord Sugar has called for an end to Britain's benefit culture claiming Eastern European immigrants see the country as a land filled with milk and honey, he points out that "hard-working people found that abuse of the benefit system is demoralising and that it needed sorting out" (Robinson, 2014, p. 1). He suggested "that Eastern European immigrants should live and work in Britain for three or four years having worked and contributed before they are entitled to benefits".

However, according to Dustmann and Frattini (2014) European immigrants to the UK have paid more in taxes than they have received in benefits, helping to relieve the fiscal burden on UK-born workers and contributing to the financing of public services. They suggest that "European immigrants who arrived in the UK since 2000 have contributed more than £20b to UK public finances between 2001 and 2011", they further suggest that "they have endowed the country with productive human capital that would have cost the UK £6.8bn in spending on education" (Dustmann & Frattini, 2014, p. 3).

They further argue that "over the period 2001 to 2011, European migrants from the EU-15 countries contributed 64% more in taxes than they received in benefits and that Immigrants from the Central and East European "accession" countries (the A10) contributed 12% more than they received" (Dustmann & Frattini, 2010, p. 3).

Work ethic and achievement

To suggest that most Eastern European students under-achieve in college due to poor language skills is perhaps an unfair assumption, many come from backgrounds where parents possess a strong-work ethic and where families value education highly. According to McGinnes (2012) Polish schoolchildren are boosting English pupil's standards, the article suggests that "although many Polish children arriving in Britain do not speak English as their first language, they do not appear to hold

back class mates in reading and writing and there is some evidence that suggests they are helping to raise grades in subjects like maths" (McGinnes, 2012, p. 1).

Research by the centre for Economic Performance at the London School of Economics shows they actually appear to have a positive effect on English children. Professor Sandra McNally, who led the research, looked at data from 2005 to 2009 taken from the National Pupil database, a census of all children in English schools. The professor of economics at Surrey University said "Evidence from catholic schools attended by children of polish migrants suggests that the presence of non-native English speakers might – in some cases, at least – have a positive effect on native results".

Professor McNally said that this could be due to better education standards in countries like Poland, as well as the work ethic of their parent, who had left their homeland to seek employment in Britain. She said "it may be the fact that immigrants from Eastern European countries are better educated and more attached to the labour market than the native population". Professor McNally also pointed out that "it was possible Polish children caught up fast upon entering English schools", she further stated that "they may have other things about them in their own environment that make them good to have in your school" (McGinnes, 2012, p. 1).

In addition to this, Sumption and Somerville (2010) suggest that recent migrants tend to be highly popular with employers and that immigration studies have found again and again that employers value Eastern European workers for their "excellent work ethic" (Sumption & Somerville, 2010, p. 24).

Equality and diversity implications

According to the Department of Education and Professional Studies (2014) "recent migration adds to the UK's existing diversity, and over a decade of experience of substantial immigration has helped the public and policymakers to adjust to EU labour mobility". Therefore, there is a growing need for the government to respond to equality and diversity issues to fully ensure that Eastern European Students are fully integrated into the British Education System. Recent government reports relating to social mobility and the most recent paper by the Social Mobility and Child Poverty Commission (2014) suggests "that the UK is deeply elitist, this was based on an analysis of the backgrounds of more than 4,000 business, political, media and public sector leaders".

The findings suggest that small elites, educated at independent schools and Oxbridge, still dominate top roles, it further suggests that key institutions do not represent the public they serve. However, some quarters have called the study "unfair and unreasonable". However, the figures below represent public sector leaders:

71% of senior judges;
62% of senior armed forces officers;
55% of top civil servants;
36% of the cabinet;
43% of newspaper columnists.

The Social Mobility and Child Poverty Commission (2014), suggest "there is a need for a diversity of talent and experiences in the UK, Locking out talent and diversity, makes Britain's leading institutions less informed, less representative and

ultimately less credible than they should be" (Social Mobility and Child Poverty Commission, 2014, pp. 12-16).

In addition to this an increase in the number of countries forming part of the European Union means that the UK is more diverse than ever before, as a consequence of this Britain will at some stage have to address the social mobility of all of its citizen's ensuring everyone is given an equal chance to reach the very top of their chosen profession.

Sumption and Somerville (2010) suggest that experience from many developed, immigrant-receiving countries suggests that the success of immigrant children depends to a large extent on their parent's background. In general, children who come from wealthier source countries tend to fare better. In practice this often means that white children from immigrant families tend to face fewer challenges to educational and labour market success than visible minorities (Sumption & Somerville, 2014, p. 34).

Sumption and Somerville (2010) further argue that while the new migrants are popular with employers and have been successful at finding work, it is less clear whether meaningful social and economic integration has been within their reach. The majority fare well, but their employment and housing circumstances can be precarious, their future prospects somewhat uncertain, and a small minority remains vulnerable to substantial short-term risks (Sumption & Somerville, 2014, p. 35).

There is an indirect link here where the challenges faced by Eastern European student's parents will have a direct impact on their children.

White other

Within many schools and colleges the ethnicity of Eastern European students falls under the category of white other, they are likely to share this category with Turkish students, and any other student who choose to identify themselves as white other. There are no legal requirements to provide a separate ethnic category for Eastern European students.

Analysis of data

The students who participated in the research were from the following countries in Eastern Europe. 1 student from Hungry, 1 student from Kosovo, 1 student from Albania, 3 students from Poland, 7 students from Lithuania and 12 students from Romania.

A total of 13 students were enrolled on the BTEC Vocational qualification, 7 were enrolled on the level 2 BTEC Qualification (equivalent to GCSE's) and 3 were enrolled on the academic A'S and A2 Qualification. 2 students were enrolled on the BTEC Level 1 qualification.

A total of 26 students from Eastern European backgrounds were asked if they had achieved at least a C grade or equivalent in English, 12 stated they have achieved a C grade in English Language while 12 stated they had not achieved a C grade in English Language. While one respondent stated they had achieved a level 1 qualification in English.

The 26 respondents were asked if they were born in the United Kingdom all 26 respondents stated they were born outside of the United Kingdom. They were

further asked if they attended secondary school in the United Kingdom 22 stated they attended secondary school in the United Kingdom, while 3 stated they did not.

26 respondents were asked how many GCSE's they had attained 2 respondents did not state the amount of GCSE's they had achieved. 1 respondent stated none, 5 respondents stated they had achieved between 2-3 GCSE's, 5 respondents stated they had achieved between 3-4 GCSE'S, 4 respondents stated they had achieved between 4-5 GCSE's and 6 respondents stated they had achieved 6+ GCSE's.

26 respondents were asked if they lived at home with their parents, 25 stated they lived with parents while one stated they lived alone. 26 respondents were also asked if they were in receipt of the college bursary, a payment made to student's parents who earned below £20,000 annually 8 stated they were in receipt of the college bursary, while 18 stated they were not in receipt of the college bursary.

All respondents were asked to state why they were not in receipt of bursary.

9 respondents stated that their parents earned above the threshold (£20,000) which is why they were not in receipt of bursary. However, 4 respondents stated they missed the deadline to apply for the bursary which is why they are not in receipt of it.

2 respondents stated that they were unsure of how it worked and therefore did not apply, 1 respondent stated they were given enough money by parents and also worked, while 1 respondent stated that they experienced difficulties relating to a member of staff in finance and therefore were unable to apply for bursary and so found a part-time job instead. 1 respondent did not give a reason as to why they were not in receipt of bursary.

Data from the college

Information was also gathered from Alis, an information system that collects data for all sixth form colleges in the United Kingdom in relation to achievement according to ethnicity. Information was also gathered in relation to value-added and achievement compared according to various ethnic groups for example White other, Black-Caribbean, Black-Other, Indian, Pakistani, Bangladeshi and Chinese.

Data for September 2014 suggests that "white other" have a total enrolment number of 27 students with an average GCSE score of 4.3 and a value added score of 0.33(this means that their achievement is not significant), Error score is 0.54 which indicates a significant score, the figures suggest that the white other group are significantly higher performers than all other ethnic groups that have been identified (Black- Caribbean, Black-other, Indian, Pakistani, Bangladeshi and Chinese). This appears to be an achievement as the majority of white other students start with the lowest GCSE scores of 4.3 in comparison to other groups.

Findings

26 students from different countries in Eastern Europe took part in the research and identified the following challenges they experienced as students with a 16-19 education setting.

Respondents 18, 20, 22, 24, and 26 each stated that they felt they experienced some form of stereo typing from non-eastern European Students. Student 18-stated that "some students are a bit negative towards foreign students", respondent 20

suggested that a student once told him "that Eastern European students only come here for the benefits". Respondent 26 suggested that "some students hold grudges against them due to conflicts that have taken part in some parts of Eastern Europe". Respondents 24 and 22 simply suggested that "they often felt stereo typed against".

Respondent 23 stated they experienced challenges with regards to cultural differences, while respondent 10 suggested their experienced challenges making friends.

Respondents 1, 2, 4, 6, 8, 11, 12, 13, 14, 17 and 23 stated that the challenges they face were all related to barriers of understanding English language.

Respondents 7, 15 and 16 did not identify any challenges that they experienced at college.

The findings from the 4 teachers who contributed to the research are as follows. Respondent 1 suggested that the challenges Eastern European students are likely to face are related to language both written and spoken, different cultures, different education systems and the fact that they are a minority group. Respondent 2 suggested that some students experience language barriers they also stated that this does not affect all students, and that a proportion of this group are likely to be in employment. Respondent 3 suggested that there may be "nuances" that Eastern European students may misunderstand and if classroom delivery is too fast it may be misunderstood. Respondent 4 identified language the language and economic challenges faced by Eastern European students.

White other

White other is the category that Eastern European Students fall within, however, they share this category with Turkish students, and any other student who identifies themselves as white other, therefore it is often quite difficult to determine the achievement and true performance of this particular ethnic group. Although the data showed that the performance from this group was better than other ethnic groups it is not truly reliable.

English Language

Only 12 respondents out of the 26 who completed the research have achieved a grade C in English Language. This supports current research that many Eastern European students require additional help with English Language.

Bursary payments

Only 8 students stated that they were in receipt of the college bursary, while 18 stated they were not in receipt of it for varying reasons, it is evident that some students are in need of the bursary but are unable to obtain it due to missed deadlines and a range of other reasons that have been provided. However, 9 stated that their parents earned above the threshold, dispelling the perception that Eastern Europeans impinge on the welfare system, this has also been supported by Dustmann and Frattini (2014).

Challenges

The main challenges faced by Eastern European students within the 16-19 education setting researched are predominately language barriers, cultural differences and stereotyping. There have also been some observations made regarding the negative perception of Eastern European students by some students within the college.

The research has indicated that some students experience financial difficulties, but only one student stated they currently lived on their own without their parents, however, taking a much closer look it appears that given the opportunity more Eastern European students should receive the bursary payment.

Conclusion

English Language continues to be a key challenge for many students of Eastern European heritage. However, many Eastern European students have been identified as possessing a strong work ethic and tend to be well organised with generally a positive attitude towards education, which often enables them to perform well on vocational as well as some academic courses leading them on to successful employment or alternatively a place at university.

However, tracking the performance and achievement of this particular group is often unreliable due to the ethnic category they tend to fall under "white other", which is also the category used to describe Turkish students, and any other student wishing to adopt or identify with this category.

Some participants identified stereotyping as a challenge they often have to face; there is a need for this issue to be addressed as well as the perception of Eastern Europeans to change.

Recommendations

- Clear guidelines and time-span provided by tutors to students regarding how to apply for bursary, ensuring that all students who meet the criteria are provided access to the fund.
- To encourage changes to the perception of Eastern European students through awareness training and discussions about stereo-types of this particular group, through the tutorial system.
- Cultural awareness day, creating an awareness of Eastern European culture through visits literature and discussions.
- Continuous language support for students of Eastern European heritage.
- A separate ethnicity category for Eastern European Students, supported by the Department of Education, facilitating a better understanding of student numbers and student performance and achievement.

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DOCTORAL STUDENTS' UNDERSTANDING OF LEGAL AND ETHICAL OBLIGATIONS IN CONDUCTING EDUCATION RESEARCH

Abstract

Conducting education research requires researchers to observe key legal and ethical obligations and to respect the rights of research participants. Legislation pertaining to data protection, in particular, has important implications for the way in which research data is collected, used, stored and shared. Researchers are also required to conduct their work within an ethical framework set by the academic community, with the relevant body in this case being the British Educational Research Association (BERA). It is essential that researchers are aware of and observe these protocols, in order to protect all of those involved in their research. The aim of this paper is to examine the understanding by students on Doctor of Education degree programmes of the legal and ethical requirements in conducting education research. This paper is based upon information gathered from 15 Doctoral students in 3 inner-London universities, whose research practice was explored through a combination of questionnaires and interviews. The findings indicate a clear understanding among the Doctoral students of the importance of observing their legal and ethical obligations, but a key conclusion is that these students would benefit from more instruction and guidance on how these should be *applied* to their particular research projects.

Background

Ethical considerations in education research

Education research is a field of social science research that undertakes 'the collection and analysis of information on the world of education so as to understand and explain it better' (Opie, 2004: 3). Research in education should be relevant to practising teachers in that it should be: *Viewed as critical, reflexive, and professionally orientated activity… regarded as a crucial ingredient in the teacher's professional role… generating self-knowledge and personal development in such a way that practice can be improved* (Hitchcock & Hughes, in Opie, 2004: 3). Educational research is also a problem-solving activity (Anderson with Arsenault, 1998) that is concerned with seeking answers to established 'problems' or 'issues' in education, asking new questions about these issues (looking at things in a different way), or posing completely new questions for the teaching profession and raising new issues by 'making the familiar strange' (Clough & Nutbrown, 2002: 45).

As Sikes notes, 'any research that involves people has the potential to cause (usually unintentional) damage' (2004: 25). This is especially true of research involving young people, some of whom may be considered 'vulnerable'. Denscombe (2003: 136-138) suggests three underlying principles that should guide the activities of researchers:

Principle 1: The interests of participants should be protected – this refers to the need to ensure that participants do not come to physical or psychological harm as a

result of the conduct of the research, and that the confidentiality of the participants is respected (see also Gregory, 2003; Lankshear & Knobel, 2004: 110; McNamee, 2002).

Principle 2: Researchers should avoid deception and misrepresentation – this principle applies both to the conduct of fieldwork (by being honest and open with the research participants) and also to the writing-up and reporting of the research findings.

Principle 3: Participants should give informed consent – this means that 'participation must always be voluntary, and [people] must have sufficient information about the research to arrive at a reasoned judgement about whether or not they want to participate' (Denscombe, 2003: 138; see also Cohen *et al*, 2007: 52; Gregory, 2003; Lankshear & Knobel, 2004: 104; Mason, 2002: 80-82; McNamee, 2002).

In addition to these principles, the most recent BERA (2011) ethical guidelines stipulate that 'Researchers must recognise the right of any participant to withdraw from the research for any or no reason, and at any time, and they must inform them of this right'. In relation to working with children, vulnerable young people and vulnerable adults, the BERA guidelines also state that 'Researchers must recognise that participants may experience distress or discomfort in the research process and must take all necessary steps to reduce the sense of intrusion and put them at ease. They must desist immediately from any actions, ensuing from the research process, that cause emotional or other harm' (2011: 7-8).

The BERA guidelines also stipulate that privacy and confidentiality should be maintained – 'The confidential and anonymous treatment of participants' data is considered the norm for the conduct of research' (2011: 7) – whilst noting that researchers 'must carefully consider making disclosure to the appropriate authorities' if behaviour that is harmful to the participant or which is illegal is disclosed.

Legal obligations in education research

Education researchers are frequently in the business of collecting, storing and analysing (processing) various forms of personal data, and therefore must pay careful attention to the Data Protection Act 1998. The eight core Principles within the Act are that data must be:

1. fairly and lawfully processed;
2. processed for limited purposes;
3. adequate, relevant and not excessive;
4. accurate and up to date;
5. not kept for longer than is necessary;
6. processed in line with your rights;
7. secure; and
8. not transferred to other countries without adequate protection (ESRC, ND; Market Research Society, 2003).

A key principle of the 1998 Data Protection Act is that of "informed consent", which has two key aspects in terms of the rights of individuals being asked for or providing information about themselves:

Transparency – ensuring individuals have a very clear and unambiguous understanding of the purpose(s) for collecting the data and how it will be used;

Consent – at the time that the data is collected, individuals must give their consent to their data being collected, and also at this time, have the opportunity to opt out of any subsequent uses of the data (Market Research Society, 2003).

Care must be taken in any research to ensure at the beginning of the interview that the respondent fully understands firstly, the purpose for which the data is being collected and secondly, their right to withdraw this consent at any point in the interview (Market Research Society, 2003). Children and young people can give their informed consent to participate in research, although if they are under 16 years of age then their parent/carer's consent should normally be obtained as well (Kings College London, 2013).

In relation to the second principle of the Data Protection Act, it is vital that researchers use the collected data only for the purposes specified when obtaining consent and not for any other uses. Researchers also have an obligation to make sure that they are faithful to the data they collect in terms of making sure that it is accurate and up to date (principle 4) and adequate, relevant and not excessive (principle 3). Researchers should avoid collecting and recording information that is beyond the scope of their research and therefore beyond the bounds of the consent that they have obtained.

The researcher's obligations under the Data Protection Act do not end once the data has been collected. How the data is stored and used is also covered by the Act. In particular, it is vital that researchers put in place measures to ensure the security of data (whether in electronic or hard copy format) so that information identifying individual participants could not be accessed by someone else. In practical terms, this means taking reasonable precautions to safeguard against loss or theft of data, such as keeping survey returns or interview transcripts in a locked cabinet, or ensuring that digital information is fully secure through being password protected. This is particularly important if the data is likely to be transported (whether physically or on an electronic device), especially if this involves travel overseas (principle 8). These considerations also apply to the electronic transmission (e.g. by email) of personal data.

Most institutions have a Data Protection Officer who researchers are advised to ask for advice if they have any specific concerns about the way in which the Act may apply to their research (ESRC, ND).

The Information Commissioners Office (ICO) has a range of penalties at its disposal for breaches of the Data Protection Act. Whilst these normally apply to institutions or organisations, they can also be levied against individuals in some circumstances as well. Potential sanctions for data protection breaches include:

- *Undertakings:* organisations have to commit to a particular course of action to improve their compliance and avoid further action from the ICO.
- *Enforcement notices:* organisations in breach of legislation are required to take specific steps in order to comply with the law.
- *Monetary penalty notices:* fines of up to £500,000 for serious breaches of the DPA.
- *Prosecutions* and possible prison sentences for deliberately breaching the DPA (IT Governance, 2014; see also Tarling, 2010).

Given that education research may involve data collection in nurseries, schools, colleges or other settings where children, young people and vulnerable adults will be

present, it is vital that education researchers are also fully aware of the implications of the Safeguarding Vulnerable Groups Act (2006). This stipulates that those working in any capacity with children and vulnerable groups should first be subject to a criminal record check through the Disclosure and Barring Service (DBS). Education researchers should, furthermore, protect themselves and their subjects by avoiding situations in which they are alone and/or unobserved in their interactions with children and young people or other vulnerable groups.

Methodology

In order to carry out this small scale research project, the intention was to seek information directly from those involved in education research in relation to their knowledge of and compliance with ethical and legal obligations in their research. It is focussed on how they have used the knowledge to inform their research practice as they gathered data for their EdD/PhD research.

Following a review of relevant literature and research on ethics and laws guiding research conduct in education, a mixed method of data collection was employed. While quantitative and qualitative methods are sometimes thought of as being opposed, the importance of a 'mixed methods approach' has increasingly been emphasised in recent years as useful. The value of combining methods is that it allows for the triangulation of data (Punch, 2005), recognises the similarities between qualitative and quantitative approaches (Blaxter *et al*, 2001), is less constraining than relying upon a single method (Morse, 2003: 195) and, crucially, strengthens the findings that are produced:

> *Combined methods of research, and the combination of data derived through different methods, have been identified by a variety of authorities as a key element in the improvement of social science, including education research. One of the key reasons advanced for this is that research claims are stronger when based on a variety of methods* (Gorard with Taylor, 2004: 7).

This research employed the mixed methods of interviews and questionnaires with 15 PhD /EdD students in three UK higher education institutions. The majority (10 students) were still in the early stages of their research.

Findings

All of the PhD/EdD students in this research reported having spent some time on the legal and ethical dimensions of education research as part of research methods modules that they were required to take by their institution. The Data Protection Act and BERA guidelines figured prominently in respondents' recollections of this training.

> *I started my Doctorate degree in education two years ago, although I am not yet on the thesis stage of my research.* However*, during my research methods lessons, as well as when I carried out my preliminary investigations, it was obvious that I had to comply with the (BERA) Ethical Guidelines for Educational Research 2011 as well as the content of Data Protection Act 1998.* (Participant 4)

I am at the initial stage of my research but have read a lot about research methods, as well as attended extra lessons on this. (Participant 11)

The process of gaining access to research participants, which typically involved writing to the head teacher or another senior manager in an institution, was often the point at which these considerations were then expressed formally and explicitly by the researchers.

Being aware of the legal and ethical implications in my research if breached, I sought the consent of my institution before conducting the initial investigation. In addition, my research involved year one students whom I had to seek their opinion on their experience coming to higher education; I needed the consent of the head of department for access to interview the students. I also reassured all of the confidentiality of my research and having given these assurances, I was allowed to carry out my interviews with the students concerned. (Participant 6)

As my work is based on a case study of an institution, I first needed to obtain the formal permission of the respective institution Head of School and other staff that will be affected. In order to protect the anonymity of the participating institution, I formally wrote a letter to the Head of School and, staff to explain the nature and purposes of the research. I did this to reassure participants of the voluntary nature of their involvement and about the confidentiality of the responses which is in compliance with the content of the Data Protection Act and BERA guidelines. (Participant 8)

In general, the participants were more strongly attuned to the ethical considerations in their research where they were working with vulnerable groups:

My research has been drawn up in accordance with the British Educational Research Association ethical guidelines, especially as my research will be involving young people, some of whom may be considered 'vulnerable'. For this reason, the ethics of my investigation are major considerations. The interests of those involved in this work need to be protected which means ensuring that participants do not come to physical or psychological harm as a result of the conduct of my research and that I take extra care to protect the confidentiality of the participants and treat them with respect. Just like I would not allow anybody to take advantage of me in terms of the information shared, so should I ensure that I do not abuse the opportunity given to conduct this research on young children? The consent of their parents is also vital to me. (Participant 11)

Where participants admitted to not having fully thought through the ethical implications of their approach at the outset, they reported that this could then impact on their research as in the following example:

In my preliminary investigation, I was ignorant of creating a conducive atmosphere when interviewing participants ... One of the participants was very intimidated and shy to speak to me on a sensitive issue. I did not know that she wanted to be reassured of confidentiality which I should have addressed before talking to her. This was due to my rush to collect the data, instead of taking time to explain to her why she was being asked to

> *participate in the research. I later realised that assuring confidentiality of her response should have helped in gathering valid information needed... I realised that the issue of confidentiality in research is essential to the participants and must be addressed to avoid the implications associated with it.* (Participant 12)

Another participant spoke of how they were very aware of the importance of presenting their findings with integrity after recalled on how a colleague had come unstuck when they had misrepresented what a research subject had told them:

> *It is important in my research to maintain the ethics of my research findings. The experience of my colleagues in trying to present what was not said by a participant made me ensure that I am honest in reporting my findings as presented by the participants – the* [only exception is if it was something that needed to be presented in a different] *manner so that it will not be harmful to the respondent.* (Participant 15)

Both of these examples highlight the value of learning through doing, which applies as much to the ethical and legal dimensions of conducting educational research as to other elements such as effective survey design, interviewing techniques and statistical analysis. This is where the structure in EdD and PhD research, of smaller scale preliminary investigations, can be an extremely valuable in enabling students to get the ethical and legal considerations right before they embark on their main research investigations.

Conclusions

The EdD and PhD students in this study all had a good understanding of the importance of ethical and legal considerations in the design and conduct of their education research. All reported that these had formed a key part of their research methods training and they demonstrated a good awareness of the relevant frameworks – namely the 1998 Data Protection Act and BERA ethical guidelines. However, in some cases there was a significant time gap between when students covered these aspects and the time when they were ready to go out and start collecting their data. Moreover, some of the students expressed a degree of uncertainty about how these considerations might affect their particular research plans.

The main conclusion from this small study is that some of the students would have benefitted from greater clarity about *how to apply the relevant ethical and legal considerations in relation to their own research.* To some extent, these uncertainties would come to the fore and be resolved during either the students' preliminary investigation work or when it came to writing to institutions to gain access to potential research participants. However, given the importance of questions of ethics and data protection – both for preventing harm to research participants, as well as protecting the individual researcher and their institution from reputational damage – we suggest that more guidance needs to be given to EdD and PhD students on putting ethical and legal considerations into practice *at all stages of their research.* Certainly, given the importance of the issues at stake, this is an area for further investigation with a larger group of education research students.

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'A GAME FOR ALL SHAPES AND SIZES': SAFEGUARDING CHILDREN FROM SPORTING MISMATCHES

Introduction

Sport is an increasingly important area of society both inside and outside of the school environment although as has been noted this has not always been the case. Until the early 1990's Physical Education was largely marginalized as a school subject within the state school system in the UK (Houlihan & Green, 2006). Increasingly specific sport in the United Kingdom, for children and young people, is delivered through sports clubs beyond the formal school environment. This provision may be within junior sections of adult clubs or dedicated youth sports clubs. In the United Kingdom different Governments have more recently seen sport as a vehicle to promote a range of different policies. Ongoing and lifelong fitness and positive psychological health are the most obvious but sport may also link to attainment (Department for Education, 2013). Greater interest in sports policy is also emerging at both a European and International level with the prospective of a 'Rights' based approach developing.

At the same time as Governments are promoting sport many of those involved in the delivery whether as paid professionals (teachers or coaches) or unpaid volunteers are increasingly concerned about the legal consequences of those under their care being injured (Greenfield, 2013b). Coaching as a practice is becoming increasingly professionalised in the UK though this process is not without its critics. The safety of those playing sport is fundamental and this is more problematic in those games where there is physical contact and an element of risk taking. The revelations around a number of high profile cases of sexual abuse of young people within the sporting environment has led to the introduction of a wide range of policies and processes (Greenfield, 2013a, 2013b). Welfare has consequently become a high priority for all those involved in the provision of sport from the Governing Bodies downwards.

Professional rugby is subject to ongoing criticism that it is becoming overly physical, with consequences for player injury, as power and strength have become important features arguably at the expense of skill. The condemnation of junior rugby is that it is just too dangerous (Pollock, 2014). Contemporaneously academic research has explored the concept of *relative age effects* whereby birth date privileges participation, one explanation for which is physical maturity. Junior rugby may therefore be very difficult for smaller younger players to engage with. This piece discusses the potential for liability for injuries caused within junior rugby taking into account the current parameters to existing liability and the potential influence of relative age effects.

Liability for mismatched size: Mountford v Newlands School

This is a rather odd case; the injury that was a broken elbow, happened in 1997 and the claim took some 8 years to reach court. This obviously creates problems for witnesses trying to recall events and surprised Waller L.J. The injury occurred

during a 7 a side U15 rugby match between two schools and governed by the Guidelines issued by the England Rugby Football Schools Union (ERFSU). The essence of liability in *Mountford* was the failure to properly determine Rule 5 of the Junior Rugby Guidelines of the ERFSU which stated that: 'Players should not normally be allowed to play other than in their own junior age grouping'. The interpretation of this rule was considered and specifically whether it contained an absolute prohibition for players participating either down or up an age group. The fact that boys could play up an age group gave weight to the notion that the rule did contain some flexibility supported by the 'not *normally*' (my emphasis) wording. This flexibility might well be required if a child for educational reasons was placed in the year below his normal age. The question then moves to how the rule should operate in practice. The trial judge determined that:

> "On this basis what SK *(the schoolmaster)* should have done was as follows: (a) he should have been aware that Rule 5 was material and consciously applied it; (b) he should have known and thought about RK's age; (c) he should have considered whether, in the case of RK, there was on the face of it any sound reason to disapply the norm so as to allow RK to play down; and (d) if so, he should have carried out a risk assessment before permitting that." (*Mountford v Newlands School*, para 7)

Accordingly the school master, who was not even aware that the child was overage, should have applied the rule. The size/weight disparity was considerable 5'11" to 5'2" and 13-14 stone compared to 7 stone. However it would be possible to find this type of difference within that same age band and the injury was not a consequence of the greater size. Neither was the injury caused by foul play. The claimant could have faced suffered the same injury from the same sized player the only difference being he would have been in the same age band and therefore not subject to Rule 5.

On the face of it the case seems limited to a failure to properly apply the relevant rules and therefore of little general interest, though it is a Court of Appeal decision. However tucked away in Waller L.J.'s judgment is a line that suggests that there could be occasions where a reasonable coach should consider weight/size differentials within an age band:

> "… only that if boys were within the correct age bands then the physical size would not preclude the larger boy playing. There will be some boys who grow more quickly and **subject to them not being so large that they will be dangerous,** (my emphasis) they should be allowed to play in their age group…" (*Mountford v Newlands School*, para 14)

The question would then be as to what would amount to '*so large that they will be dangerous*' and whether this is to be determined by state of maturity, weight, strength or some other measurement or combination of factors. There is also the context of each match that would have to be considered which would have to include the size of the opposition. This is problematic, as rugby has always prided itself as a sport that caters for 'all shapes and sizes', this inevitably means that each team will contain some smaller and some larger players. However the nature of rugby is that anyone may end up tackling any another player regardless of position so impact between the smallest and largest is quite possible within open play.

Mountford clearly imposes coach liability where an overage child is carelessly selected. Similarly a coach who deliberately chose an overage player to increase a team's prospects of winning rather than for the benefit of the child, that was envisaged by the discretion in Rule 5, would undoubtedly be liable for injuries caused by that player. If confined to a narrow interpretation of the rules on moving between age bands the decision is relatively straightforward it is though Waller L.J.'s dicta about differentials within age bands that is problematic.

One question is whether it is possible to observe a developing 'law of mismatches'. A number of separate areas have been identified that a coach ought to take into account in consideration of the players in his/her care. Labuschagne and Skea (1999, p. 176) suggest the following categories are relevant: skill, experience, injuries, maturity, height and weight, age, mental state, sex or sexual orientation. Most of these may coincide with age but as they note: 'Age should not be the sole factor in matching players. It is, however convenient to use age-groupings, but the other factors mentioned should be the deciding consideration, for age has little to do with the physical condition, maturity height and weight of the participant'. This seems to be set in the context of individual sports and the example they provide under 'skill' is wrestling. It is clearly more obvious and easier to take these factors into account within an individual sport. If the coach is making the individual match e.g. selecting both players then there is a much more obvious duty owed that can be fulfilled. This can be more easily translated into a team environment within training rather than competition. However the fundamental question is what is required, within a team sport, especially given the *Mountford* judgment where the coach/ educator is selecting only one of the teams. The prime consideration is the use of the recognized age bands and not permitting competition across ages. But what though of differences within age bands themselves?

The Concept of Relative Age Effects

Children are ordinarily placed into age bands both for school years and external sports participation normally with a correlation between the two. The school age band in the UK commences on September 1st so children born between that date and the 31st August the following year are placed in the same cohort. An alternative approach is to use a calendar year e.g. January to December. The latter approach is more common in the Southern Hemisphere. Within either of the systems there can be up to a full year of age difference between the youngest and oldest pupil. In the UK this age grouping is translated into eligibility for sport outside of school. The overall effect is year age groups in sport whether at school or outside although some types of schools with fewer participants may combine age bands e.g. year 7/8. There has been considerable academic interest in the concept of *relative age effects*:

> "This difference in age between individuals in a group has been termed relative age and, in educational research, has been shown to be related to academic achievement in a variety of ways." (Barnsley & Thompson, 1988, p. 168)

Original interest was focused on differences in educational achievement according to birth date within the school year. Barnsley and Thompson (1988) however identified the effect of birth date on high level sports participation in this

instance the Canadian National Hockey League. Relative age effect is classified by comparing the birth dates of the sample group, within the sport, to the general population. It has been identified in a number of different sports both contact and non-contact and within different countries (Musch & Grondin, 2001). A number of different explanations for the phenomenon have been distinguished including; competition, physical development, psychological factors, and experience. This paper is concerned purely with physical development, as this is the major problem for physical contact sports in terms of injuries. The earlier the birthdate the earlier maturity may start, ordinarily for boys the largest variations in height and weight occur between the ages of 13-15. So earlier maturity may exacerbate differences:

> "It seems entirely plausible to assume that a relative age disadvantage, coupled with a late maturation, can make it virtually impossible for a young player to compete." (Musch & Grondin, 2001, p. 155)

It is not clear if the period of increasing height growth amongst children in the developing world has leveled off (Schönbeck *et al*, 2013). However the central issue may be more around maturity in terms of strength and weight rather than just height. Height may be a more significant issue in sports such as cricket or even tennis. Whilst these sports lack actual physical contact that is present in rugby, football and hockey both cricket and tennis involve the propulsion of an object towards an opponent at high speed. It seems apparent that younger players within an age group are at a disadvantage when it comes to both team representation and a professional career. If rugby teams are comprised of the bigger (older) players then there may be a similar match. However this will not be the case if games are between different school forms or houses encompassing the younger players. This provides the opportunity for a clear mismatch in a game that is already being criticised for its physicality.

The dicta in *Mountford* suggests that extreme (and therefore obvious) physical supremacy may require some consideration by the coach/organisers. One proposal is that players could be tested for height and grip strength to govern eligibility (Nutton *el al*, 2012). The 15-year-old age group addressed by the Nutton *et al* study was selected as it represents the transition between junior to senior school rugby. They argue for a combination of maturity testing and injury surveillance to establish a knowledgebase and provide a more robust testing regime. However greater physical size on its own is not an indicator of performance advantage a view described as 'a common misconception in adolescent sport' (Krause *et al* 2013, p. 5). Interestingly a study of matches at the Rugby World Cup in 2007 found no increased risk of tackle or collision injuries between 'lighter and/or less experienced teams and heavier and/or more dominant teams' (Fuller *et al* 2010, p. 38).

It has been proposed that weight categories could be applied to eliminate Relative Age Effects in this example between young boxers (Delorme *et al*, 2014). This could be extended to establish classification based on biological rather than chronological age, however there are resource implications for this type of approach. (Delorme *et al*, 2014). Understanding the relationship between maturity and exercise has importance beyond individual and team performance and extends to involvement in exercise which in turn relates to the design and evaluation of activities (Cumming *et al*, 2009).

Conclusion

Legal claims for injuries in innovative areas are driven by advances in medical knowledge. Better understanding of the causes and consequences of concussive injury has led to both the huge group action claim against the NFL but also the introduction of new policies and protocols at all levels in some sports. For example in Rugby Union the protocol has led to players who have suffered concussive injuries being forced to miss subsequent games. The annual player injury report highlights the importance of concussion and the increasing awareness of the issue:

> "Concussion was, for the third consecutive season, the most commonly reported Premiership match injury (10.5/1000 player-hours) constituting 12.5% of all match injuries. Improving concussion awareness amongst players, coaches, referees and medical staff and the standardisation of concussion management has been the major medical focus of the English professional game since 2012 and is likely to have contributed significantly to this continued rise in concussion reporting." (RFU, 2015, p. 3)

This type of injury is an on going area of concern and Governing Bodies will need to be vigilant to ensure as much as possible the safety of the players at all levels. Similarly the more knowledge that is accrued around the importance of maturity over age the greater the requirements for teachers and coaches to apply that knowledge in team selection. Pressure to protect participants from injuries caused by mismatches in strength and weight is likely to increase because of the concussion litigation. It is foreseeable that in the future players will have to be assessed for their suitability to play contact sports based on factors other than age.

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Part 6

Research Education: Developing Globally Competent Researchers for International and Interdisciplinary Research

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DEVELOPING EDUCATIONISTS AS GLOBALLY COMPETENT EDUCATION LAW RESEARCHERS FOR INTERNATIONAL INTERDISCIPLINARY RESEARCH: A SOUTH AFRICAN PERSPECTIVE

Introduction

Education law: An unknown quantity?

The hybrid field of scholarly inquiry to which we will refer as education law for convenience sake is by no means universally known as an academic discipline and as a separate field of law. It enjoys noteworthy recognition as a discrete field of academic enquiry in the law in a limited number of countries including the United States of America, Canada, Australia, New Zealand, England, South Africa and some European countries. This recognition does not imply that it is taught and researched at all higher education institutions in these countries. It also does not imply that all educators and jurists are equipped with the knowledge and skills needed they need to have to apply the law correctly in the field of education. This hesitant recognition of this field of enquiry is clear from the literature and is also suggested by the fact that it carries different designations such as education and the law, education law, school law and even education policy and law.

Some hybrid fields of study can develop into fully-recognised separate areas of study. Both the principles of law (in particular the common law) as well as those of education are rooted in the origins of all human sciences. Even a cursory glance at the principles underpinning education shows a remarkable resemblance to the principles of the common law. For example, both disciplines emphasise the best interests of the child as a learner and the dignity of all human beings including children. When legal principles are applied in the field of education, they do not become educational principles but remain legal principles and constitute the body of knowledge and law that is known as education law. In a particular field of knowledge hybrid separate fields of study can and do develop. In law maritime law, military law and medical jurisprudence are examples of hybrids that have developed into fully-fledged separate fields of law. Similarly the area covered by "education law" has developed into a separate law discipline. It goes without saying that an educationist doing education law research should be cognizant of the above.

The status of education law in South Africa

The study of human endeavour where education and the law have to function in a relationship with each other is not universally acknowledged as a law discipline. In 2007 Mawdsley and Visser, two eminent jurists from the United States of America and South Africa respectively, published the findings of their investigation into the development of education law as a discrete law discipline in South Africa.

In their article Mawdsley and Visser (2007, p. 155) state that, for any field of activity to be recognised as a (hybrid) discipline or a partial discipline of established and recognised fields of enquiry, certain criteria need to be met. They list some of the criteria and apply them to education law in South Africa and conclude that, insofar as the criteria that they quote can be applied in South Africa, "a critical mass" has probably developed in South Africa. However, they also believe that education law is still in its infancy in South Africa compared with among others the United States of America and Europe (Mawdsley & Visser, 2007, p. 161).

Education law is a relatively young field of study not only in South Africa (Stone, 1981). This lack of appreciation also obtains in the rest of the world.

The very nature of education law implies a peculiar and sometimes uneasy or even hostile relationship between education and the law, including relationships between educationists and jurists. This relationship is often likened to a marriage of convenience but perhaps one should rather look to the metaphor of a dance to understand the relationship between education and the law better. A dance implies a constant change of position and a degree of tension and we believe that the implied tensions between educators and jurists and between education law and other law disciplines to which we allude are not necessarily detrimental to the further development of education law.

Definition

We suggest that, in our consideration of education law, it should be understood as the particular collection of legal rules that regulate all activities and relationships in education. These legal rules as applied in education are derived from various sources such as legislation, common law and case law.

Why is education law research necessary?

The law forms a framework within which all actions and relationships in education have to reside in order for them to be legal. This framework is constructed from legal principles and determines what may (is allowed) or may not be done (is not allowed) in education, what can or cannot be done (prohibited) and what must be done (is peremptory) and what must not be done (is prohibited). Staying within the framework ensures immunity from the law and affords protection of rights and freedoms and facilitates harmonious interaction in a specific setting. Dworkin (1986) argues that the role of the law is to act both as a sword and shield and this resonates with the nature of education law.

Education law being of a hybrid nature means that both its mother disciplines namely the law and education have to be explored to contribute the knowledge (with its concomitant skills, attitudes and values) needed for the field to assert itself as an independent discipline. Being able to unearth and integrate knowledge from two discrete fields requires a unique set of skills in a single researcher or a committed joint effort by two or more researchers. Because education law as a relatively new

field of academic interest, a great deal of basic and applied research swill have to be done to develop its knowledge and skills bases.

Education law requires concerted and sustained research efforts by both jurists and educationists to develop the base for its scientific recognition. This becomes evident from a number of considerations among others that there is no comprehensive textbook on education law that covers the entire field. There are a number of publications which cover aspects of the field but there is no coherent overview of the field. Researchers' work is compounded by a lack of publication opportunities demonstrated among others by the fact that there is no scholarly journal dedicated to education law in South Africa. Researchers therefore have to publish overseas or in journals that do not specialise in education law. Occasionally South African law and education journals have published special editions on aspects of education law, for example, *Perspectives in Education* (2004), *De Jure* (2013), *Journal for Juridical Science and Southern African Public Law* (2013). The South African Education Law Association (SAELA, formerly known as the South African Education Law and Policy Association, SAELPA) has published some conference volumes after some of its annual, international conferences (for example Beckmann, 2006) and the Inter-university Centre for Education Law and Policy (CELP) has published a number of handbooks on areas of education law such as learner discipline in schools and public school governance (CELP, 2015).

Why is education law research challenging?

It is possible that educationists may think that they are the only people qualified to do research on educational matters while jurists might think that they have sole ownership of the right to do research on aspects of the law. In the above paragraphs it was suggested that the relationship between education and the law as embodied in the academic field of education law is challenging and is characterised by tensions. The fact that the relationship between educators and lawyers is not always harmonious and smooth also permeates and impedes the field of education law research. Access to participants or respondents is compromised by the proven lack of knowledge of education law of education officials and managers which results in their being hesitant to make available information which might point to incompetence on their part.

The competence to do quality research involving the harnessing research methods and approaches in two discrete disciplines is not easy to acquire. Although the value of knowledge of education law seems to be recognised by the majority of role players in education, authentic cooperation between educationists and jurists in most of research projects in education is still to materialise. In sum, educators might want to do research on aspects of the law but do not necessarily have the skills for such work while lawyers might also want to focus on aspects of education management in particular but may lack sufficient and suitable knowledge and skills.

Most of the research done in the field of education law tends to be skewed being carried out either by educationists with little applicable knowledge of, and skills in law or by lawyers with insufficient knowledge of, and skills in education. At the moment there is little cooperation between jurists and educators in education law research and the methodology employed tends to belong exclusively in the field of human sciences (namely education) or law.

Educationists are almost invariably forced into using "traditional" human sciences research methods based on a qualitative approach to research. The need for qualitative research by educators on legal and policy issues in education need not be argued. Doing multi-discipline education law research will allow researchers to acquire a variety of skills, knowledge sets, attitudes and values which will equip them better for research in this area. It also appears that the research which focuses on positive law (in particular the rights and duties of different role players) tends to avoid engaging with the social and political implications of aspects of education and the law such as access to education and the curriculum (which does not seem to match the demands of the technological and knowledge era) (Beckmann, 2015, p. 13).

The need for globally competent education law researchers

Getting a grasp of education law in South Africa is not easy. In addition, Section 39 (1) of the Constitution of the Republic of South Africa of 1996 (Republic of South Africa, 1996) provides that:

When interpreting the Bill of Rights, a court, tribunal or forum:
(a) must promote the values that underlie an open and democratic society based on human dignity, equality and freedom;
(b) must consider international law; and
(c) may consider foreign law.

This section suggests that more than a grasp of South African education law is imperative for local education law researchers. The constitution suggests that any educationist who does research on education law has to be able to integrate relevant international law into his/her knowledge of education law and must also be able to consider the possible influence of foreign law when analysing and interpreting aspects of education and the law. However, this does not mean that all international law such as conventions and charters apply to South Africa automatically. Section 231 of the constitution (Republic of South Africa, 1996) provides among others as follows:

(1) The negotiating and signing of all international agreements is the responsibility of the national executive.
(2) An international agreement binds the Republic only after it has been approved by resolution in both the National Assembly and the National Council of Provinces…

Ideally an education law researcher should be conversant with international (and some foreign) law as well as with the contents of international instruments such as conventions and charters but should also know which of them apply in South Africa. This will protect them against incorrect interpretations of the law and increase the quality and trustworthiness of their research.

Globally competent researchers should therefore be abreast of international and foreign law and to its application and power in their own countries.

Training and research in education law: Current state of affairs

Education law training resides largely in the former Afrikaans language universities as well as in the distance education institution of higher education, the

University of South Africa (UNISA). Moreover such training (including in-service training) is offered largely by faculties of education. This already suggests a problem that has to be overcome namely a lack of interest on the part of jurists and faculties of law (in particular in former English medium institutions). A further problem is that some scholars confuse law and policy. Some believe that law and policy are the same thing or even that policy is law. Some even believe fallaciously that law is subservient to policy and that policy can amend law – this amounts to a misapprehension of the roles of law and policy in education (as well as the interaction between them). This misapprehension may subvert the rule of law and mislead researchers.

Currently, research on education law is mostly done by educationists (lecturers attached to universities and postgraduate students) who are almost invariably forced into the strait-jackets created by the "traditional" research in human sciences and education namely the qualitative, quantitative and mixed methods approaches. These methods may be useful in the collection of data on education but have limitations regarding research involving the law that applies to education.

Another serious challenge to educationists who want to do research in the area where education and the law converge is that methodology handbooks are almost without exception written for researchers in the human sciences. In South Africa educationists who desire to learn more about research methodology in law have one standard reference book namely *Legal research, method and publication* (Venter, van der Walt, van der Walt, Pienaar, Olivier & du Plessis, 1990). This book includes sections that deal deals with types of research that might be useful to educationists doing education law research namely comparative legal research and historico-legal research. However, having studied and taken cognizance of this information does not necessarily mean that an educationist is qualified to, or competent in using methods in law research. As far as could be ascertained, there is only one book on research in the field of education law namely *Research methods for studying legal issues in education* (Mawdsley & Permuth, 2006). The fact that this book is meant for education law researchers in the United States of America limits its value for South African education law researchers to some extent.

A potential educationist education law researcher working at postgraduate level is faced by another obstacle namely that it is difficult to find educationists able to supervise research that is essentially legal in nature. Similarly, there are not many of supervisors in the field of law who can confidently supervise research executed in the field of education.

However, jurists are on occasion invited to be external examiners for students from the field of education who engage in research that includes a legal perspective. The opposite of this is also true. At the moment co-supervision of postgraduate students working on education law issues by jurists and educationists seems to be the exception rather than the rule.

The target group for the development of globally competent educationist education law researchers

If South Africa aspires to produce globally competent researchers for international and interdisciplinary research on education law, clarity has to be obtained on who the target group of such development should be. In this paper we

deal with researchers whose are educationists and who need to become competent in education law research.

Our paper concentrates on researchers primarily qualified in and working in education. Within the field of education postgraduate students at *magister* and doctoral level and staff at universities are likely to form the nucleus of the suggested group of globally competent education law researchers. Other agencies like parastatal research bodies, education authorities and teacher unions could also contribute to the development of a cohort of education law researchers as contemplated but they are not likely to be dominant in such a group.

Development strategy

It should be evident that the current training of educationists as education law researchers is not likely to produce researchers that will comply with the demands of global competence and international inter-disciplinary research. Ideally such a researcher should have an advanced formal qualification in either law or education and a formal qualification at a suitable level in the other. Reaching this ideal is not reasonably feasible in the foreseeable future and we therefore propose that a suitable development strategy should comprise:

1. Establishing training programmes for education law researchers at universities and recruiting suitable candidates in association with interested parties.
2. Equipping education law researchers in training with skills and competencies to understand and interpret relevant law.
3. Involving both educationists and jurists in the training of education law researchers and in developing suitable training programmes. The South African Education Law Association (SAELA) and the Interuniversity Centre for Education Law and Policy (CELP) might be suitable platforms from which to launch initiatives in this regard as both of them comprise jurists and educationists.
4. Including selected themes from education management programmes in education faculties (such as learner discipline and governance), from the training of jurists in law faculties (such as labour law, the interpretation of statutes, constitutional law, the law of delict) and from other relevant disciplines such as political science in a programme aimed at developing researchers that can contribute knowledge and skills to the development of the hybrid discipline known as education law. It is evident that there should be training in research methodology pertaining to both fields.
5. Fostering the ability to identify the legal underpinnings or dimensions of problems in education.
6. Deliberately exposing students to a selection of international education law experts among others through lecturer and student exchanges, conference attendance and postdoctoral fellowships.
7. Emphasising the development of skills to do work in interdisciplinary research teams.
8. Fostering an ability to establish and maintain international academic networks.

9. Developing an appreciation of the fact that the problems concerning education in South Africa are not totally unique and that the information era and modern communication technology have linked all nations and opened up the possibility of international co-operation in virtually all fields of human endeavour including research on possible responses to challenges.

Conclusion

The global village "interconnected by an electronic nervous system" as foreseen by Marshall McLuhan (Livinginternet.com, 2015) has truly arrived and research undertaken in isolation and not taking cognizance of what pertains in other countries limits its potential to contribute significant knowledge towards understanding and possibly solving perennial challenges in education. John Donne's words (Online-literature.com, 2015) that no "man [researcher] is an island, entire of itself; …" are truer now than ever before. For the sake of its children, its education system and the wellbeing of the country itself, South Africa has no choice but to endeavour to develop globally competent educationist education law researchers able to participate meaningfully in international interdisciplinary research and remedy the present deficiencies in education law research. Hopefully the development strategy that we suggest will expeditiously contribute to a marked increase in the number of such researchers in South Africa and enhance their impact on society at large.

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UNDERSTANDING THE NATURE OF STRUCTURES IN EDUCATION: RECENT DEVELOPMENTS

Introduction

In this paper I would like to talk about how 21st century education researchers could, and most likely, should approach the scientific description of the various entities that they might encounter. The word "entities" in pedagogical context refers to phenomena and structures such as "an education system", "education", "curriculum" or "motivation". Let us take the entity or phenomenon that we all know as "an education system". Taken at face value, an education system consists of various elements such as schools, management structures, financing structures, support structures, curriculum and curriculum planning, physical facilities, learners, educators, community support, and many more. We could say that it is relatively easy to describe these different elements of the education system and show how they all fit together to form an education system as a total structure. I would argue, however, that such a description would be scientifically indefensible for the mere fact that, in view of current scientific approaches, the description could be seen as simplistic and reductionistic.

The purpose of the remainder of this paper is to offer grounds for this claim. I structured the paper as follows. I shall begin by briefly outlining three basic epistemological approaches, and then use that outline as the basis for a further discussion of how one could conduct research into pedagogical/educational structures in a manner that would circumvent simplistic and reductionistic descriptions.

The gist of the 2014 BCES Conference Paper

In that paper (Van der Walt, 2014a, pp. 24-31) I argued that researchers nowadays have a choice of three research approaches: foundationalism, post-foundationalism and post-postfoundationalism:

- The foundationalist approach or broad research paradigm that has been in vogue since the rise of Rationalism in the 17th century is typically characterised by aspirations on the part of the researcher to formulate so-called grand narratives that might explain how intricate structures (such as education systems) are constructed and function. In most cases, since this approach is rooted in Rationalism, such grand narratives are founded on sets of preconceived or a priori ideas, assumptions and convictions. The foundationalist approach tends to be deterministic in that it attempts to show how certain factors necessarily impact on other factors, and that such impact can even be predicted on the basis of previous research that had discovered certain general patterns or "laws". Applied to, for instance, our understanding of how an education system is structured and works the researcher with a foundationalist orientation would attempt to discover generalizable and universalistic laws and would be tempted to illustrate in an organogram how everything fits together and functions in the grand narrative that we refer to as "an education system".

• The second research approach or paradigm that the researcher can opt for can be referred to as post-foundationalism, an approach that is closely related to a post-modern approach to life and culture in general. This approach is typically characterised with a rejection of all the ideals and aspirations of foundationalism, particularly its ideal of constructing large-scale explanations (so-called grand narratives) and explanatory models. It rejects the notion that the construction of such grand scale models is at all possible and also the idea that a researcher should work from certain preconceived ideas, assumptions or convictions. In brief, it is averse to all types of philosophical, religious and scientific foundations that supposedly might influence one's research. As a result, research according to this approach is piecemeal, pragmatic and problem-oriented. Applied to the matter of understanding, for instance, the structure of an education system the post-foundationalist would opt for an analysis of a single system in a problem-oriented manner without attempting to draw generalizable conclusions or points of view from the analysis.

• The third research approach that researchers might opt for is post-postfoundationalism, a research orientation that attempts to steer through between the determinism of foundationalism and the indeterminism (relativism) of post-foundationalism. Whereas in foundationalism the researcher's preconceived principles, convictions, ideals, suppositions and norm structure are strongly foregrounded, and whereas in post-foundationalism these foundations are rejected or their validity and applicability strongly contested, post-postfoundationalists tend to keep such foundations in abeyance in the back of their minds and allow them only to play a part in the research process once the phenomenon in question has been analysed and closely investigated. Applied to the issue of understanding, for instance, how an education system is structured and functions, the person with a post-postfoundationalist orientation will analyse various education systems *without* compromising the investigation with a set of preconceived normative ideas about how education systems *should* be structured and function. In the post-postfoundationalist mind-set the life-conceptual and other convictions of the researcher may be allowed to play a role as the process of understanding unfolds. This approach allows for various "understandings" of what we mean by the term "education system".

The above outline is a very brief overview of the three basic research orientations that researchers could consider. I now wish to take the argument a step further by offering a few ideas about how researchers nowadays can avail themselves of the advantages of a post-postfoundationalist orientation the usefulness of which is locked up in the fact that it is a balanced approach that rejects the determinism of foundationalism on the one hand, and the indeterminism of the various forms of post- or anti-foundationalism on the other. I offer some suggestions below against the background of the current terminological confusion in methodology textbooks[1].

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[1] What one author refers to as a research paradigm another might see as a research approach, another as a theoretical approach, another as a research orientation, another as a research strategy or part of the research design, and yet another as a theory or even a method. Inexperienced researchers are confused by this terminology.

Unpacking post-postfoundationalism in terms of research theories and research methods

In recent months, I have explained in several of my publications what I mean by using the term "post-postfoundationalism" (see Van der Walt, 2014a, pp. 24-31; Van der Walt, 2014b; Van der Walt & Steyn, 2014, pp. 827-829; and also my other contribution in this year's Proceedings of the BCES Conference). What I now offer in the rest of this paper is an attempt to relate the notion of post-postfoundationalism to paradigms, orientations, approaches, theories and paradigms that experts discuss in education research methodology books. I shall attempt to show how one can follow a post-postfoundationalist orientation by taking a post-positivistic stance, by applying theories such as post-structuralism, chaos theory and complexity theory, and by implementing methods such as interpretivism, constructivism and even fuzzy logic. By following this route, researchers can circumvent the determinism and reductionism of a foundationalist orientation, and the (total) relativism and indeterminism of a radical post-foundationalist orientation.

Post-positivism as a post-postfoundationalist stance

Post-positivism can be regarded as a post-postfoundationalist stance since it allows for certain limitations, contextual factors and the use of multiple theories in terms of which research findings can be interpreted (MacMillan & Schumacher, 2010, p. 5). In allowing all of this, it is a move away from positivism, a stance that can be regarded as foundationalist because of its cause-and-effect scheme and its ideal of discovering generalizable (natural) laws. Post-positivists believe that reality (in this case, the structure of an education system) can be understood but never perfectly understood; research therefore has to be conducted with an awareness of the subjectivity of the researcher. Post-positivists are quite prepared to incorporate interpretivist concerns around subjectivity and meaning. Reality (also in the form of an education system) is multiple, subjective and constructed by people and hence not a fixed entity that exists in a vacuum; it is always influenced by context (cultural, gender, and so on). Post-positivists therefore search for evidence that is valid and reliable in terms of the existence of the phenomenon in question rather than in generalisation, and hence not in absolute truth in the form of generalisation and laws (Maree, 2008, p. 65). Post-positivists believe therefore that researchers can only describe a phenomenon even if it does not necessarily "measure" the phenomenon (Henning, 2011, p. 17). Secure, once-and-for-all foundational knowledge and grand narratives of a singular objective reality are replaced in post-positivism by tentativeness and multiple warrants by the researcher (Cohen, Manion & Morrison, 2011, p. 27).

Three theories that could be applied in a post-postfoundationalist approach
Post-structuralism

Post-structuralism can in a certain sense be equated with postmodernism (Merriam, 2009, p. 10). Radical postmodernists take an anti- or postfoundationalist stance in that they reject all grand narratives and all claims to absolute truth. However, less radical forms of post-structuralism can be regarded as post-postfoundationalist because they assume that there may be a variety of truths, and that the truth may be couched in variety, diversity and plurality. Post-structuralists hold that structures, hence also the structure that we refer to as "an education

system", are not easily discovered and in some cases are not even discoverable at all. Our statements and conclusions about such structures are therefore unavoidably fallible. Despite all of these encumbrances, we have to persist with our investigations of structures (Maree, 2009, p. 22) since that provides us with new knowledge. Post-structuralism is also post-postfoundationalist in that it entertains the idea that all perceptions, concepts and truth claims are couched in corresponding "subject-positions" which are nothing more than transient epiphenomena of a certain cultural discourse. According to Honderich (2005, p. 746), foundationalists find post-structuralism unacceptable because of its anti-transcendentalism (transcendentalism is typical of foundationalism), its scepticism and relativism. Poststructuralists clearly differ from foundationalists in that they emphasize becoming over being, change over permanence and interrelation over individual substances (Mickey, 2008, p. 24).

Complexity theory

In terms of complexity theory, an education system would be regarded as a complex organisation consisting of a set of interdependent parts which together, in various possible configurations, make up a whole that is interdependent with some larger environment. Because of their complexity, systems resist simple reductionist analyses because interconnections and feedback loops preclude holding some subsystems constant in order to study others in isolation. Complex systems can arise from the interaction of agents that follow relatively simple rules. Patterns are "emergent" from these interactions in the sense that new properties appear at each level in a hierarchy, and therefore are never fully predictable (Anderson, 1999, pp. 216-218). No single factor can explain how the system actually works or succeeds in its mission.

Complexity theory regards an outcome (for instance, whether an education system functions according to expectations) as emerging from a complex network of causal interactions and not of single factors that can be accurately measured. The fact that analytic reduction cannot tell how a number of different things and processes act together when exposed to a number of different influences at the same time (which is typical of education) (Dekker, Cilliers & Hofmeyr, 2011, pp. 1-3) makes complexity theory an excellent exemplar of a post-postfoundationalist approach to research.

Chaos theory

Chaos theory also fits into the post-postfoundationalist approach to science, on condition that the notion of "chaos" is correctly defined. Fowler and Van der Walt (2004, p. 65) correctly argued that "chaos" in chaos theory, contrary to the common use of the word, does not designate a state of disorder. The use of the term "chaotic systems" already indicates that a form of order is being implied. Some systems and structures are described as chaotic systems not because they are disorderly but because of their unpredictability. What we learn from chaos theory is that we should not think of the world as orderly in the sense of conforming to various laws and regularities only if and when one can predict the outcomes of a certain action, on condition that one creates the right conditions. In line with complexity theory (see above), certain systems or structures (arguably also an education system) is a complex open system of which certain aspects and sub-structures behave apparently unpredictably and indeterministically though at the same time, if viewed from a

distance or after a certain time, will be clearly ordered and law-like. In such systems, say Fowler and Van der Walt, there is "order in disorder" and not a total absence of order. In a foundationalist conception, order is characterised by necessity and predictability. However, the order we encounter in today's world of physics and non-linear dynamics is characterised by contingency rather than necessity, unpredictability rather than predictability, and a dynamic, non-linear causality rather than linear causality. In analyses of education systems, therefore, it is important to make very clear the nature of the "chaos" that is involved.

Chaos theory brought to our attention the existence of more than one kind of order in our world. Once education systems researchers begin to understand this new concept of "order" they will be open to the fact that education systems are flexible, not all predictably the same, show a great diversity, that they respond, each in its own way, to their contexts. They will also be more prepared to approach education systems with a problem-focus rather than with a rigid structure focus. They will welcome the unexpected and the unpredicted, not as disruptions to their orderly conception of education systems but as opportunities for understanding a world that is full of surprises (Fowler & Van der Walt, 2004, p. 66).

Three methods that could be applied in a post-postfoundationalist approach
Fuzzy logic

Post-postfoundationalists will more readily accept the usefulness of fuzzy logic than foundationalists with their more rigid deterministic orientation. In a foundational situation, X is either a member of a set or not, whereas in fuzzy logic X can be a member of several sets and to any degree between 0 and 1 where degree 0 corresponds to "is a member" and 1 corresponds to "is not a member", with various degrees of vagueness in between (Audi, 2005, p. 337). Fuzzy logic clearly allows for degrees of truth: a proposition may, for instance, be to a degree both true and false, and a proposition and a negation to some extent both be true. Fuzzy logic does justice to the intuitive idea that some indicative sentences are not wholly true and not wholly false (Honderich, 2005, p. 326). Applied to our understanding of the phenomenon "education system" this could refer to the many imponderables involved in the investigation (typical of complex systems), which leads to the conclusion that what one might say about one education system might not be true for all other systems or might indeed be false in the case of another system.

Interpretivism

Interpretivism as a research method is characterized by a concern for the individual and for understanding of the subjective world of human experience. Efforts are made to get "inside the person" and to understand a situation from within. Furthermore, interpretivism concentrates on action and not on the state of static structures. This, according to Cohen et al. (2011, p. 17-18), "may be thought of as behaviour-with-meaning, as intentional behaviour and as such, future-oriented". The data yielded by an investigation of an aspect of reality (such as an education system) will therefore include the meanings and purposes of all involved in the situation. The theory thus generated must make sense to the researcher in one particular time and place as opposed to different meanings that might emerge in other times and places. The theories that result from the application of interpretivism "are likely to be as diverse as the sets of human meanings and understandings that they are to explain". Interpretivism as a method is quite suitable to a post-

postfoundationalist approach in that "the hope of a universal theory (grand theory or narrative) which characterizes the normative (foundationalist – vdW) outlook gives way to multifaceted images of human behaviour as varied as the situations and contexts supporting them" (Cohen et al., 2011, p. 18). Interpretivism is closely associated with social constructivism and holds that there is no single observable reality but rather multiple realities and interpretations of a single event. Researchers, therefore, do not discover knowledge or meaning but rather construct it (Merriam, 2009, pp. 8-9).

Constructivism

Constructivism is a term that is often used interchangeably with interpretivism (Merriam, 2009, p. 9). Radical constructivists tend to argue that knowledge has no permanent, objective and stable truth-value; they argue that researchers can never understand the world and reality objectively since each person interprets the world on the basis of personal background, experience and interactions with reality and other people. The usefulness of the knowledge or meanings that one develops with respect to reality therefore depends on the degree to which the researcher's concepts, models and theories are adequate as explanatory for the knowledge of the meaning that is being applied. Radical constructivists also tend to question the idea of an underlying order in reality (much in line with chaos theory in its more radical forms) that researchers have to study and discover. Instead, as Van der Walt and Fowler (2006, p. 15) show, persons construct and interpret their own life world and the meanings therein, and their constructions are always open to revision. Knowledge is only "true" or worthwhile if it helps the researcher make meaning of reality. Less radical constructivists, Van der Walt and Fowler (2006, p. 49) conclude, accept the possibility of an orderly given world of which the researcher must construct meaning for him- or herself.

Conclusion

The above theories and methods are of course not the only ones that could be considered for implementation in a post-postfoundationalist approach. Critical theory, advocacy theory (including feminism), participatory theory and grounded theory come to mind as other theories that might also be considered[2]. Point is, only theories that do not attempt to result in grand scale constructions and explanations, in deterministic cause and effect structures, in working out preconceived structures and systems should be applied in a post-postfoundationalist approach.

As a final word, I return to the aim of this paper, as stated at the outset, namely how 21st century education researchers could, and most likely, should approach the scientific description of the various education / pedagogical entities that they might encounter. It is clear from the discussion above that researchers with a penchant for creating grand narratives would opt for the foundationalist approach whereas those who are critical of the viability of and / or need for such grand scale theories would opt for one of the other two orientations. In view of the fact that all researchers to a

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[2] Empiricism, Behaviorism, Pragmatism, Functionalism, Phenomenology, Realism and Structuralism come to mind as theories that might not come into contention because of their emphasis on measurable data, cause and effect thinking and their deterministic views about relationships between entities and within their structures.

certain degree and extent inevitably have a number of preconceived pre-theoretical (life-conceptual, philosophical) and theoretical (scientific) presuppositions, convictions and ideas in the back of their mind and would also prefer to avoid the reductionistic and simplistic tendencies associated with such grand scale theories or constructions, the post-postfoundationalist orientation would probably provide best in the needs of educationists plying their trade in the early 21st century. It is also clear from the discussion above that researchers' choice of a broad epistemological orientation would dictate their choice of theories and research methods.

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DEVELOPING RESEARCH CAPACITY THROUGH PROFESSIONAL TRAINING

Abstract

This paper reports on a planned, professional, postgraduate diploma that aims to develop educators and education officials professionally towards policy making and at the same time bring about transformation in the students' work environment. In order to focus particularly on this aim and also to instil reflexive practices, we will focus on two empowering approaches, namely action research and appreciative enquiry, in addition to the generic research topics that have always been included in previous post-graduate research training in the Faculty of Education. Research at various levels is required throughout any policy process, and thus we planned to infuse the coursework with tasks in which students will need to use and further develop a variety of research skills. The students' ability to use the skills and knowledge that they acquired in the programme, in their own work contexts towards change will be assessed by means of a capstone research project.

Background

The South African education system has experienced many challenges over the years. While great strides have been made since 1994 in terms of policy development, providing infrastructure and including learners in a unified education provision model, the vision of quality education is still unattained. For instance, it was reported, based on the countrywide Annual National Assessments, that 35% of learners in Grade 3 cannot read (*Rapport*, 2014) while Jansen (*Sunday Times,* 2014) expressed his concern that 500 000 of learners who enrolled for Grade 1 in 2002, never sat for the final Grade 12 examination in 2013.

One of the key barriers to quality education is the ability of educators and education managers to cope in the ever-changing policy landscape in South Africa, and to effectively bring about change in line with the transformation agenda of the country. In this regard Vos et al. (2012, p. 67) argue that the "behaviour of principals as well as educators… [do] not contribute positively towards the development and establishment of an effective organisational climate". Phasa (2010, p. 177) calls for capacity building amongst teachers and school managers and a "philosophical shift from an individual to a system approach" that cannot simply be done in isolated training sessions. Yet, while many teachers have enrolled for formal qualifications at higher education institutions over the past 20 years, it has not been successful in terms of its impact on schools (Ngidi et al., 2010).

Qualifications in South Africa are positioned on a 10-level National Qualifications Framework (NQF) as detailed in the *National Qualifications Act (67/2008): Higher Education Qualifications Sub-Framework* (HEQSF) (RSA, 2014). In order to transform and regulate teacher education, the *National Qualifications Framework Act (67/2008): Revised policy on the minimum requirements for Teacher Education Qualifications* (MRTEQ) (RSA, 2015) was

promulgated in line with the HEQSF. *Inter alia* it requires all teacher education programmes to (RSA, 2015, pp. 8-9):

> *… address the critical challenges facing education in South Africa today … by incorporating situational and contextual elements that assist teachers in developing competences that enable them to deal with diversity and transformation.*

Topping the level 7 initial degree for pre-service teachers (BEd), on a postgraduate level, three new professional qualifications, namely a Postgraduate Diploma in Education (PGDip) (level 8), a professional Masters in Education (level 9) and a professional Doctorate in Education (level 10) were included aiming to improve education in the country through formal qualifications. This paper reports on the envisaged research capacity building integrated in the *PGDip in Education Policy* programme that we developed.

Policy framework for teacher qualifications

The PGDip serves to strengthen and deepen educators' knowledge in a particular field of education. The primary purpose of the PGDip as stipulated in the *Revised policy on the minimum requirements for Teacher Education Qualifications* (RSA, 2015) is to "enable working professional educators to involve themselves in advanced reflection and development by means of a systematic survey of current thinking, practice and research methods in an area of specialisation in their profession, or in a sub-field of education" (p. 42). The PGDip demands a "high level of theoretical engagement and intellectual independence" (p. 42). While a sustained research project is not obligatory, it is stated that "the qualification may include conducting and reporting on research under supervision" (p. 42). This 120 credit programme has to resonate with the specific level descriptors of the qualification authority (SAQA, 2012). It requires students to engage "in an area at the forefront of a field" (p. 10), understand research methodologies relevant to the field, be able to "interrogate multiple sources of knowledge" (p. 10) and "evaluate knowledge and processes of knowledge production" (p. 10). Students are required to address ethical issues "based on critical reflection" (p. 11), "critically review information gathering, synthesis of data, evaluation and management processes in specialised contexts in order to develop creative responses to problems and issues" (p. 11) and to communicate "creative insights, rigorous interpretations and solutions to problems and issues appropriate to the context" (p. 11). All of these imply research in the professional context.

In order to understand the rational for *the PGDip in Education Policy*, we need to consider the policy process (PP) and the context of policy making in South Africa.

The policy making process

Policies are usually developed in response to a particular need (Pillay, 2006). The process is cyclical and involves *agenda setting*, *policy formulation*, *policy adoption*, *policy implementation*, *policy evaluation* and *policy review*. Research of various kinds is required throughout the PP. Thus while policy making is part of the professional work of those involved, research skills are required in this professional

environment (Putt & Springer, 1989). Pillay (2006, p. 453) clearly comment in this regard that in "changing societies such as South Africa, policies are continually being revised and replaced. … Good-quality research is essential to guide policy-making". It is thus clear that the policy maker require professional knowledge and skills, as well as the capability to do research.

In South Africa policies are made at three levels in the education context: National Policies are made in line with the Constitution and other education and general legislation, by the Minister of Education. The nine provinces then develop provincial policies in line with the national policies, taking the particular needs of the province into account. At school level, the School Governing Body (comprising parents, teaching staff, non-teaching staff and school learners) is required to develop school policies within the particular context of the school. It is thus evident that a need exist to capacitate educators and education officials at various levels to understand the policy making process, the legal framework within which the policies should be made and how to conduct appropriate research towards developing policies.

Conceptualisation of the Postgraduate Diploma in Education Policy

Based on the challenges faced in education in South Africa and steered by the guidelines supplied in the documents discussed above (and the drafts that preceded them), we asked the question: *What programme can we design that will build research capacity, professionally develop educators and educator officials towards policy making and at the same time bring about change in students' work contexts?* We thus demarcated the programme outcome as follows:

> *On completion of the PGDip in Education Policy Studies, graduates will be able to critically read, interpret and deliberate national and provincial education legislation and policy. Informed by democratic values, they will apply knowledge, practice skills and demonstrate attitudes that will enable them to follow policy processes to bring about socially responsive piecemeal[1] transformation within their work contexts.*

The different coursework modules were aimed to progress from the general to the particular. We started with international education systems, then to the education system of the student's country and finally to the student's own context. The coursework modules comprise the following:

- Education systems
- Foundations of education law and policy
- Legislative and policy framework for education in South Africa
- Professional context: policy for transformed practice in education
- Policy and management processes for responsive transformation in education

In addition to the above coursework modules and a generic module on education theory, the students receive research training and have to embark on a capstone project where they have to research their own practice towards change.

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[1] This term was coined by Karl Popper in his *The Open Society and Its Enemies*, first printed in London by Routledge in 1945, and represents something being done piece by piece or in small steps.

Research capacity building through training

Linked with the need to bring about transformation in education, in addition to generic research topics that are taught in the current postgraduate programmes, we focused on approaches to research that build capacity, reflexivity and transformation. The generic topics include argumentation and academic writing, the process of research, research paradigms, ethics in research, as well as qualitative and quantitative research methods, data analyses and reporting. This is complemented by the generic module on education theory and how to use it in research and practice. In order to particularly focus on the aim of the programme to capacitate students to bring about transformation and change and also instil reflexive practices, we focus on two empowering approaches namely action research (AR) and appreciative enquiry (AI).

Creswell (2008, p. 604) explains AR as a "spiral of looking, thinking and action". It allows researchers to scrutinise and appraise their work (McNiff & Whitehead, 2006) and is thus a suitable approach to allow the PGDip students to work towards solving specific problems in their own contexts though policy processes (Creswell, 2008). AR places students at the heart of the enquiry (McNiff & Whitehead, 2006) and thus enable them to identify and address challenges. The AR cycle involves a cycle of *observing, planning, implementing* and *reflecting* (McNiff & Whitehead, 2006). AR can be used effectively to improve one's own work context, and as such bring hope (cf. LeeFon, 2013 amongst others).

AI, in addition, is an opportunity centred approach that initially consisted of 4 stages, namely *Discover, Dream, Design* and *Destiny*, with *Define* being added recently upfront. Boyd and Bright (2007, p. 1020) indicate that it is a research approach that "aims to create a change through a focus on elevating strengths and extending communities". *Define* stage identifies the focus. *Discover* stage focuses on the best of what exists: that is the strengths of the organisation. During the *Dream* stage, participants are requested to imagine their organisation at its best, responding to the question "What might be?", *Design* stage entails the group to develop concrete proposals for change "How can it be?" and *Destiny* (also called delivery) that allows for empowerment, improvisation and learning "What will be?" (Boyd & Bright, 2007; Bushe, 2013).

We selected these two transformative approaches in addition to generic qualitative and quantitative designs, because we believe that they would equip students to bring about change in their workplace. The research module is offered in the first semester of the two-year programme. While their research capabilities are finally appraised in a capstone project in the second year, students have to draw throughout the coursework from these research knowledges and skills during assessment activities, some of which I will point out.

Juxtaposing the three cycles (PP, AR, and AI), their compatibility becomes clear. The *agenda setting* phase in the PP resonates with the *observing* phase of AR and the *Define* phase of AI. During this phase the issue that needs to be addressed must be clarified and communicated. Policy formulation and policy adoption links with the *planning* part, and can be done through a process of AI (*Discover, Dream, Design, and Destiny*). This will allow for policy development and adoption in the light of the strength of the organisation, and imagining what can be. Policy implementation links with implementation during AR, while policy evaluation and

review reverberate with *reflecting* in AR. Combining AR and AI with the PP, creates the opportunities to respond to challenges and needs in a positive and constructive manner. However, many of the skills required for such research is embedded in the coursework modules and the assessment, of which I provide some examples.

Research capacity building through assessment tasks

To be successful in postgraduate research, students must be able to do a thorough and coherent literature review. This will be expected of students, in most of the coursework modules, as illustrated by the following example from the *Education systems* module:

> *Drawing from multiple sources of knowledge, and using the six societal factors that influence education systems as a framework for analysis, explore and deliberate on the nature of the SA Education system, including contemporary education issues[2] and concomitant vulnerable groups within this system.*

Part of a policy researcher's work, is to present information in a way that informs the audience comprehensively, and thus logical communication of information is required. The following is an example of where students are required to do this in a group during the *legislative and policy framework for education in South Africa* module:

> *Illustrate by means of a comprehensive poster presentation the legislative and policy framework within which the South African Education system operates, showing the relevance and interrelatedness within the framework.*

Policy researchers must not only be able to collect comprehensive information and communicate such information, they must also be able to provide a critical voice in the light of the information. This is for instance assessed in the module on *professional context: policy for transformed practice in education,* as follows:

> *As a class, compile a newspaper on contemporary education issues. Each student will be required to act as a journalist, and contribute various international and national perspectives on specific issues in a creative and rigorous manner. Critical editorial comment will be required.*

We expect students as future policy makers to be informed about issues that role-players in the South African context are grappling with. This informs the *agenda setting* as part of the PP and resonates with *observing* in the AR cycle. They must be able to provide recommendations based on comprehensive information, as is evaluated in the following assessment task in the *foundations of education law and policy* module:

> *Based on the current legislative and policy framework, principles of law and policy, common law, case law and court judgements, suggest appropriate steps for stakeholders to deal with issues and complexities as presented in various newspaper articles.*

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[2] We will change the issues to be discussed every year, *inter alia* based on the issues that the students agree upon in class.

In line with AR and AI, policy researchers need to be able to appraise their own context. The following is an example of an assessment tasks that evaluate this ability in students individually in the module on *professional context: policy for transformed practice in education*:

> *Communicate your own professional context, and relate it to contemporary issues and vulnerable groups in your context.*

Linked with the Dream phase of AI, the students will be given particular tasks where they need to reflect, plan and dream, as this example from the module on *policy and management processes for responsive transformation in education* shows:

> *Write an essay framed within your own professional context to critically consider the possibilities of policy to creatively address the identified contemporary issues in their own work environment.*

and

> *Write a reflective and analytical essay in which the framework [on what democracy is] is utilised to assess their own professional contexts whilst also imagining the possibilities for piecemeal change.*

And finally the capstone projects requires students to use the insights and skills that they gained in the programme to write a research essay using one or both of the transformative approaches discussed earlier:

> *Write a 6000-words research paper on the small-scale action research and/or appreciative inquiry project that you undertook in your own professional context, using a policy process towards addressing a particular issue to bring about piecemeal change.*

Conclusion

The purpose of a PGDip in Education is "to prepare an educator for an advanced leadership position in that field" and as such the programme that was discussed in this paper aims to prepare students for advanced leadership positions in the field of Education Policy and Law (RSA, 2015, p. 42). Policymaking at the various levels in South Africa needs to address challenges that role-players face, based on research. We are convinced that by capacitating students to do research within the context of their work, towards bringing about change, this programme has the potential to contribute to piecemeal transformation in education. This programme will roll out at the start of 2016, and will be monitored to appraise the extent to which the intended outcome of the programme is reached.

Acknowledgements

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MARTINI QUALITATIVE RESEARCH: SHAKEN, NOT STIRRED

Abstract

Although the number of qualitative research studies has boomed in recent years, close observation reveals that often the research designs and methodological considerations and approaches have developed a type of configuration that does not adhere to purist definitions of the labels attached. Very often so called interpretivist studies are not interpretivist, and data analyses do not fit the methodological considerations that underpin the study. This paper look at some of the typical pitfalls that particularly novice researchers get themselves entrapped in when they carelessly 'blend' or 'stir' qualitative research methodologies and methods. The notion of 'blended' qualitative research is conceptually shaken in terms of its paradigmatic roots, methodological approaches and data analysis considerations. Based on this, I will postulate that many of the "Martini" qualitative research studies should rather be classified as descriptive or exploratory qualitative research studies and that the label of emergent coding in data analyse should best be replaced with a priori coding as data analysis approach.

Introduction

It started gradually, and then over the last three or four years as external examiner and supervisor of postgraduate students I have notice an increase in an emerging trend: The growth of something that I will loosely call *blended qualitative research or Martini research*. I am not going to argue whether the *blended qualitative research* exists or does not exist, but I would rather pay attention to the emergence of looseness in *qualitative research* that seriously undermines the rigour and character of qualitative studies. My expostulation in this paper is therefore against those researchers that arbitrarily blend things that by their very nature should not be blended. Time will not allow me to discuss all the permutations of how various qualitative traditions are blended, but I would like to start a discussion by briefly looking at three aspects: (a) the conceptualisation or labelling of the research (i.e. the ontological nature of the research), (b) the methodological (theoretical/ paradigmatic nature of the research), and (c) the analysis of data.

The conceptualization of qualitative studies

Over the last century a wide range of approaches to qualitative research has developed that are based on different theoretical understandings and methodologies, such as phenomenology, hermeneutics, interpretivism, symbolic interactionism, anthropology, sociolinguistics, ethnomethodology, qualitative evaluation, neo-Marxist ethnography, feminism, etc. (Atkinson, 2005). Hesse-Biber and Leavy (2011) argue that qualitative research is an exciting interdisciplinary landscape comprising diverse perspectives and practices for generating knowledge. The fact that it is widely used across the disciplines results in a number of terms that are often used interchangeably, such as 'ethnography', 'case study', 'qualitative research', 'interpretivism' though each term has its own particular meaning. The

result is that qualitative research methods today are a diverse set of ideas encompassing approaches such as empirical phenomenology, grounded theory, ethnography, protocol analysis and discourse analysis (Miles & Gilbert, 2007). I would argue that as researchers we have a tendency to blend different approaches/ methodologies although they are not meant to be blended. For the sake of my argument I will look at one such example.

It seems to me that novice researchers often assume that all qualitative studies are located within an 'interpretivist ontology'. Often, these novice researchers spend time explaining multiple realities, multiple identities, constructivism, and how researchers can only make sense of the world by looking at how people through interaction with others construct reality. However, by the time novice researchers get to the methodology and the methods of data collection and data analysis they have long forgotten their claimed ontological stance. At the root of the problem is a tendency to allow methods to dictate methodology (Newby, 1997; Creswell & Watson, 2008). While it should be a serious and thorough process of finding an own ontological and methodological stance consonant with your values and concerns (Salmon, 1992, p. 77), many novice researchers brush over their ontological understanding to get to method. The result is an impoverished understanding of ontology and researcher's ontological stance.

In many cases, it seems that novice researchers have not grasped the philosophical underpinnings of the nature of science. They use terms arbitrarily and simply massage them into fitting with what seems to be in fashion. Often their whole approach to ontology is nothing more than a flirtation with words and an eclectic compilation of plagiarised ideas that are loosely woven together with no substantive theoretical underpinning. They seem to be oblivious to the fact that ontology in essence also entails the commitment of language befitting a specific conceptualization. Most of the terms and concepts used in research refer to complex sets of human behaviour and understandings and can seldom be reduced to simple, fixed and unambiguous definitions (Gough, 2004). A prime example is the unsound practice to assume that philosophical grounding is something you can easily mix and match. This is particularly true in the case of mixed method research where a researcher tries to sit on two theoretical chairs: positivism and interpretivism. It creates all types of contradictions and tensions as the poor researcher tries to juggle two theoretical traditions rather than finding an alternative philosophical home, such as pragmatism (Rorty, 1982).

Griffiths (1998, p. 48) warns that it "… is important for researchers coming new to the field to be aware that any brief explanation is bound to be partial. The exact meanings of terms … are inherently unstable, precisely because of the depth of argument about them". Brushing over ontology without penetrating the deeper lying concerns, assumptions and values associated with a particular position is to try and give credence to something that inherently does not have it. Often, it ends in a parade of terms depraved of meaning or a senseless attack on positivism, and a desperate attempt to justify qualitative research. Qualitative research has reached a maturity that does not need this type of superfluous turf wars. In fact, we are long past the duality of quantitative/qualitative debate and the researcher should grapple with the more substantive philosophical debates of ontology.

Methodology[1]

Methodology is the bridge that brings our philosophical standpoint (i.e. our ontology) and method (the tools and instruments to be used in gathering data) together (Hesse-Biber & Leave, 2011). However, in reviewing research projects it seems that methodology is often determined by method. For example, the researcher who is familiar with interviewing as a method tries to justify the choice of methodology as if it is dependent on method. Yet, method should not be allowed to dictate methodology.

It seems to me that when it comes to qualitative methodologies, novice researchers often reduce qualitative research methodology to a singular *interpretivist* approach. They often create the idea that what makes qualitative research distinctly different is that it deals with the interpretation of texts or words. The problem may be related to the claim made by authors such as Polkinghorne (1983) when they claim that all qualitative studies rely on linguistic rather than numerical data, and employ *meaning-based* rather than statistical forms of data analysis. The notion of meaning-based is then equated by novice researchers as implying interpretivism. This is of course a misrepresentation. All researchers, irrespective of methodology employed will at some point need to interpret collected data to come to particular finding based on the data set. A *t-value* in quantitative research only has meaning once it is interpreted, but that does not make it an interpretivist study.

True interpretivist research takes on a different meaning. As Crotty (1998, p. 67) puts it: "Interpretivism, looks for culturally derived and historically situated interpretations of the social life-world". Carson et al. (2001) argue that interpretivism departs from an assumption that reality is relative and multiple. According to this tradition there can be more than one reality and more than a single structured way of accessing such realities. The knowledge generated from an interpretivist approach is based on socially constructed and subjective interpretations (Carson et al., 2001; Hudson & Ozanne, 1988) thus creating a complexity of different interpretivist approaches, such as symbolic interactionism, phenomenology, realism, hermeneutics, naturalistic inquiry, etc. as well as hybrids and permutations such as hermeneutic phenomenology and symbolic hermeneutics. It is therefore erroneous to claim that all qualitative research is interpretivist in nature.

Closer scrutiny of many studies often reveal very little that bears resemblance to anything vaguely related to interpretivism. Sandelowski (2000, 2010) claims that researchers often use these more prestigious concepts, such as interpretivism, narrative or phenomenology, when their study is in fact *qualitative description*. This does not mean that such research is of a lesser status or less scientific. On the contrary, researchers "… conducting qualitative descriptive studies stay close to their data and to the surface of words and events" (Sandelowski, 2000, p. 334), but their work produces worthwhile information that can inform other studies. What their work does not do is to go deeper to a level where their interpretations are culturally derived and historically situated interpretations of the social life-world

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[1] Methods are the tools that researchers use to collect data. These tools enable us to gather data from individuals, groups, artefacts and texts in any medium about social reality. Methodology entail some understanding of the world and how to know it, variously referred to as theory, philosophy, or paradigm and therefore include all aspects of the research design pertaining to sampling, data collection, data analysis, and trustworthiness.

(Crotty, 1998) and thus they cannot really claim their work is interpretivist in nature. What typically makes a study a "qualitative description" study is the low-inference when data is analysed and presented. It does not interrogate the deeper lying discourse, or deconstruct the hidden meanings and it does not consider different ways in which the data could have been presented. It takes for granted that which was offered and present it in a way that seldom penetrates deeper than the surface. It does not imply a total absence of interpretation, but what is presented is "… filtered through human perceptions" (Wolcott, 1994, p. 13), and it does not evolve into 'thick descriptions', or a theory rich analysis or a complex interrogation of meaning or discourse. What it does, is to offer a well-substantiated description of a phenomenon in its contextual setting thereby assisting us to form a better understanding of a phenomenon in its contextual setting. One of the key requirements for good descriptive research remains data saturation and if that has not been achieved then the rigour of the study is disputable.

Qualitative exploratory designs are typified by the aim to gain better insight into a specific situation. It is not designed to come up with final answers or solutions to problems. According to Stebbins (2001, p. 327) such research is a distinctive way of conducting science so as to reveal an emergent reality, identity and meanings related to concepts, cultural artefacts, structural arrangements, social processes, and beliefs and belief systems normally found in a group, process, activity, or situation under study. The rationale for doing qualitative exploratory research is not so much located in a particular ontological position as it is in the conviction that, as knowledge project, researchers possess little or no scientific knowledge about the group, process, activity, or situation they want to examine. Qualitative exploratory is primarily inductive and aimed at collecting sufficient data about a particular phenomenon using a smallish sample, purposively selected, to gain insight and understanding of the particular phenomenon in its contextual setting. Good qualitative exploratory studies could lead to the formulation of a hypothesis that requires further investigation or it could inform the further development and refinement of theory. Many studies often paraded as interpretivist fall into the cadre of qualitative exploratory studies.

Data analysis: 'shaken, not stirred'

Elliott & Timulak (2005) maintain that qualitative research often employs a general strategy that provides the backbone for the analysis – a step-by-step recipe for analysing qualitative research data starting with the preparation of data, to the coding and categorising of data. Although important and useful it does not fit every single type of qualitative study. All qualitative studies in the final analysis end in some form of content analysis. The type of content analysis to be used is determined by the methodology employed. If the methodology or methods were inappropriate the data analysis is doomed to fail. And this is where the arbitrary blending of methods and methodology avenges itself.

Content analysis is defined as a systematic, replicable technique for compressing many words of text into fewer content categories based on explicit rules of coding (Stemler, 2001). In general three types of content analysis are distinguished. First, the conventional content analysis (also called *emergent coding*), with its coding of data into categories derived directly from the textual data

(inductively). This, unfortunately, is the type of content analysis that is generally abused as most novice researchers try to massage their data analysis to fit the emergent coding regime. This could be totally erroneous if the study was incorrectly located in its methodological home. If the methodology was more appropriately located as descriptive or exploratory, the methods of collection would have been commensurate with the type of study and the analysis will logically follow and be more directed. Since most studies spend a considerable time in literature review and the development of a theoretical framework, the methods of data collection and the questions asked are, as a rule, pre-defined by the theory or literature reviewed (Weber, 1990). The researcher therefore has *a priori list* of questions taken from theory to be asked that are already grouped in terms of categories, making the whole exercise so graphically described in the emergent coding approach, superfluous.

In general, novice researchers take great care in discussing the limitations of their study. They explain how the data are specific to the context and participants studied. They take great pain in stressing that the study cannot be generalised, that the sample was limited, that the area of study was confined to a particular school district, etc., but for some reason they feel compelled to make recommendations and then all these claims evaporate into thin air and with the greatest of confidence they make recommendations that should apply to all schools, to all educators and to contexts. Qualitative research is not intended to culminate in recommendations aimed at improving practice. It is not in the nature of qualitative research to do it. The purpose of qualitative research as Dougherty (2002) puts it, is to unravel the complex and intricate webs of contexts and people so we can appreciate what the phenomenon is really like in practice, how it works, and how it is affected by other patterns in the organization or society. Qualitative research is based on the principle that social life is inherently complex, and is inextricably bound up in ongoing social action among people in the situation. Qualitative research therefore aims at adding to our knowledge project and posing hypotheses worth further exploration, it corroborates theory, refines theory or develop new theories requiring further research.

Conclusion

In the literature there is general agreement amongst scholars regarding the range and diversity of approaches, methodologies and methods in qualitative research. As Peshkin (1993), Reid & Gough (2000) claim no singular paradigm or research model should have a monopoly in education research. Drawing on a diversity of approaches, techniques and traditions is essential to the vibrancy, openness and continuance of education research (Reid & Gough, 2000). Researchers, both experienced and those new to the field, should embrace the opportunities created by these developments, but you cannot shake and stir your Martini and you cannot blend methods and methodologies that do not blend.

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ENRICHING HIGHER EDUCATION TRAINING THROUGH VALUES AND SOCIAL ENGAGEMENT

Abstract

The present study starts describing the relevance of university mission statements and how they have been interacting with the social demands throughout the history of higher education. This way, the recent development of a knowledge economy has strongly impacted universities that look for ways to produce and commercialize ideas (second and third missions). The increasing accreditation agencies and regional and international rankings have helped to reinforce these processes. This trend has created a situation where isomorphic mechanisms are pressing universities to align themselves with models that do not always fit a wide spectrum of them. In addition, this chapter underlines the excessive emphasis on faculty research productivity in detriment of ethic and values training that is key to have a successful professional development and an effective and well-adjusted implementation of any project. A final section discusses possible scenarios with alternative tools for administrators, who want to enrich the actual state of their universities.

Key words: higher education, mission, research, values, and ethic

A Complex Issue: University Mission

Since the beginning of unsophisticated higher education systems, knowledge, in all its multiple forms, has been a key element to support the interaction between teachers and learners. However, this is true, transmitting, not discovering, of what was accepted as science or dominant body of ideas was a central role in tertiary education. For instance, medieval institutions revolved around liberal arts with basic disciplines that were called Trivium and Quadrivium. The basic knowledge was in books with few observations of reality (Lucas, 1996). Students and professors search and research most of what was already known. This model of learning had its first serious fractures during the Renaissance when inquisitive people started going back to nature to discover its laws. The idea of measuring and controlling reality had a deep grasp in most of the great artists and nascent scientists in Florence and throughout Europe. Leonardo Da Vince is one of the most famous incarnations of the renaissance revolutionary thinking: men can control and manipulate nature (Lucas, 1996). However, universities were attached to this transmitting model for many centuries. While the modern thinkers made important contributions to sciences, it was not until the flow of new discoveries that the industrial revolution brought in during the XVIII and XIX centuries that higher education started to have deep changes. Step by step, a second mission that promoted discoveries, as an additional purpose for education, took place to enrich the mission of teaching. Brothers Humboldt made a significant impact capturing the spirit of the epoch encouraging a peculiar integration of transmitting and producing knowledge. This is also referred as the second mission for modern Universities and the first revolution of higher education (Etzkowitz, Webster & Healey, 1998). Pretty soon, the University

of Berlin, later Humboldt University,[1] became a model for producing research through students with prominent professors who chaired (cathedra) specific disciplines or fields (Veysey, 1970). This meant a significant change of paradigm that helped to further new discoveries in an increasing subdivision and specialization of knowledge. Accordingly, Humboldt University was awarded more than two dozens of Nobel Prizes between late nineteenth century and the three decades prior to the World War II (WWII). Many American Universities imitated this model and made substantial progress advancing research as a major university mission project. The University of Chicago and Johns Hopkins are two remarkable examples that followed very closely this standard. The latter one is currently the most federal funded for producing outstanding bioscience research.[2]

The WWII slowed down German Universities, while the American counterparts grew very quickly and expanded into a new dimension of knowledge produced in universities, namely the transferring of ideas to society that initiated the second higher education revolution. One of the main engines that sped up these changes was research done for military purposes (Altbach, Berdahl & Gumport, 2005). The Federal Government started to fund research projects through Universities to move them from discipline-oriented research, as the Humboldtian model, toward the application of discoveries (Slaughter & Rhoades, 2004). Little by little, advanced and wealthy universities developed linkages with businesses and companies to commercialize their inventions with substantial profits for institutions and their inventors. In the United States of America (US) this trend was officially recognized and legalized through the Bayh-Dole Act (1980), allowing universities to partner with industry and government to advance research that can be potentially profitable. Nowadays, Universities may commercialize their intellectual propriety even if Federal funds are used for conducting research projects. Thus, industry, government, and academia joined efforts to generate lucrative knowledge that can also impact economy creating new jobs. Etzkowitz (1996) called this the "Triple Helix" interaction, to capture the trilogy of actors. This new stage of higher education is frequently called "The third mission" of higher education and its second revolution (Slaughter & Rhoades, 2004). Universities and faculty members have not only the duty of teaching and doing research, but also, through this new mission, the task of impacting and transforming society through discoveries. This model has proved to be successful for a reduced number of research-oriented institutions with plenty funding and human resources to conduct profitable and complex studies (Fielden & LaRocque, 2008).

In addition, globalization and Neoliberal policies have paved the way for the dissemination of this Triple Helix interaction that is becoming a model (Wanna-be) for most Universities, but also to governments that are promoting and funding aggressive research programs, through sets of bold policies, to compete at national and international levels (Salmi, 2007). As a natural consequence of these isomorphic processes, and in order to become relevant, rankings and quality accreditation are very much supportive of producing some kind of knowledge and transferring it to society. Everyone who wants to become visible and highly ranked with accredited programs, tries to rearrange institutional missions and policies to match these trends

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[1] For more information about Humboldt University, see its website at http://www.hu-berlin.de.
[2] For more details, see http://www.nsf.gov/statistics/infbrief/nsf10329/.

(Gregorutti, 2011). Thus, the dissemination of this model that connects knowledge with economic development was rapidly accepted (Toakley, 2004). Emerging countries, aligned with these policies, seek ways to compete and improve their economies in an increasingly global market. In fact, the commercialization of research has gained such a prominence, that it seems to be almost a religious belief. Proof of this is the international rankings, such as The Times, QS, Shanghai, among others, which give a predominant weight to the production and transfer of knowledge to rank higher education quality. Universities must intervene in their surrounding economies and produce changes. Humanistic and social sciences, with their values, are slowly but surely put aside to allow the ones that have a direct impact in this global competition that measures most things by income and jobs (Kirwan, 2010).

In short, Universities have been accepting new missions and models to transform people and communities. No one can deny that ideas are becoming a key factor to succeed in this knowledge society and that higher education is contributing in a powerful way. However, more findings not always lead to solutions, as it may be assumed. In addition, the implementation of any change to transform a specific social issue or a technical challenge would always depend on the human factor. Particularly, is there anything that Universities should be doing to enrich students' understanding of reality and help them to develop a set of principles that would make them more successful when applying new ideas or projects?

Knowledge Is Not Enough

A central argument here is that discoveries and knowledge are not sufficient to solve society's existing problems. Information and knowledge can be used against the benefit of society. Highly educated people, without constructive values or satisfactory perception of reality, did many of the biggest frauds and scams. Alfred Nobel discovered the dynamite and it was an encouraging step forward for industrial chemistry, but almost immediately it was used to kill and steal. A similar case can be found in controlled nuclear radioactivity. The creation of knowledge without moral and social parameters can be a weapon instead of a solution.

It is essential for Universities to focus on the development of values in students' thinking. That is to say, a global understanding of moral, social, ecological, democratic, and even individual issues that may allow students and future professionals, to integrate the third mission in a society with a broad idea of what are the major problems and needs. This intentional activity can be called the development of a "well-rounded person". This broad understanding Universities should promote, is a central concept that fosters a global and practical grasp of personal and social interactions with knowledge and its impact (Peterson & Seligman, 2004). Discoveries are going to be much more effective, if they are applied taking into account all dimensions, including the human ones. Successful professionals would have an all-encompassing understanding of multiple factors and follow the best possible option that would benefit society, or a particular sector of it, as a whole. To do so, graduates must have a set of principles and values that would make them aware of the implications of their research or professional venture. An inclusive understanding of reality like this would produce a much better development of professional and disciplinary activities. This idea of a *well-rounded person* would enhance the impact a University can have on students' lives and as well as on society.

As was previously mentioned, the creation of knowledge without clear positive values is not necessarily a contribution to society. This vital mission component is not systematized by most of the existing Universities. Supporting this idea, but not associated with a particular set of beliefs, Kronman (2007) argues that the vast majority of Universities in the U.S. have lost the dimension of "meaning of life". That is to say that they have become professional training schools disregarding other dimensions, such as moral values. According to Yang (2003), this trend is also found throughout the world. Developing wise students is probably one of the most significant contributions that nowadays a University can make to higher education, as Spanier (2010) asserts:

> No matter how much brilliant research we generate, how many award-winning books we publish, and how many people we serve through outreach activities, our primary mission is the education of students. We need to continue to find new strategies to enhance student success. (p. 92)

From a secular standpoint, both public and private Universities would do well introducing what constitutes the formation of "well-rounded" students. This idea is not constrained to moral values, but also to other important social aspects such as ecology, community service, and the general use of affordable resources that will not damage nature and society. Universities must educate and counsel students to avoid spoiling their environment and communities for the pursuing of personal gain (Metcalfe & Fenwick, 2009). All this as opposite to savage capitalism practiced by many. This undertaking can be a distinctive bonus for universities in the 21st century (Spanier, 2010).

Universities need to add an ethic and moral dimension when training students to become professionals or researchers. It is not enough for students to acquire, over a period of training, a set of skill without a moral backbone that would impact their further development. This moral backbone is not intended as a set of religious beliefs, although it may include them. It is actually a rational construction of values toward a professional development with social awareness. Through a wide range of activities, studies, and experiences with communities, students establish an understanding of the world that would allow them to be professionals concerned with all the dimensions a society has. Training like this is structured to advance society in a holistic approach trying not to disrupt ecosystems, democracy, and human relationships. As Spanier (2010) declares echoing the same concern:

> We need to assist students in exploring ethical issues in their professional and personal lives. I have always believed that the greatest challenges we face in higher education are issues of character, conscience, citizenship, and social responsibility among our students. We need to prepare our students to live in a world that does not operate like a cable news show, where people sit on opposite sides of a table and yell at each other, expressing extreme positions. Few things in this world are black and white; and we must prepare students for the gray areas where people must come to terms with decisions in the workplace, in their family life, in their community, and across borders. (p. 93)

Such training would impact deeply how knowledge is handled and implemented through, for instance, patents and commercialization. Without this moral backbone, graduates can misuse resources and even valuable discoveries.

Policy Implications

Now, what kind of strategies can be implemented to enrich and promote these interactions among students? A University with a broader scope of training should provide context and opportunities to help students to develop values that have practical impact. For that to happen, academic structures may start with the following approaches:

1. *Alternative reward systems.* Any project that would promote the development of values through activities that go beyond a class or laboratory will require extra resources and efforts. If professors are assessed and promoted mainly based on research productivity, anything that is not related to publishing and external funding will not succeed on the long run. The solution is not one versus the other, but an integration that would complement each other. Thus, institutions should provide time and resources needed to carry innovative approaches to these issues.

2. *University-communities-service.* If a University wants to instill social and civic values in students, it would then need to promote a proactive agenda of community engagement. Many American Universities[3] are providing organizations and resources to help students to have a more realistic understanding of surrounding communities. This way, institutions can also reach out and transfer, in multiple ways, the wealth of knowledge available impacting on social and economical issues.

3. *University-service-learning.* Similarly, connecting students with real-life-problems is a powerful tool to improve learning.[4] As it was already mentioned, some Universities in the American context are implementing different strategies to advance knowledge and learning. Studying issues with practical involvement may improve understanding and relevance of scientific knowledge.

4. *Curricular spaces to rethink values.* Universities need to make room for disciplinary discussions about the purpose of one's career. What kind of contribution for life and society will the graduates do in their fields of expertise? In other words, what is their legacy? Responses to these basic questions have the potential to enrich higher education outcomes.

5. *New proposals.* Universities will be enhanced if new mission elements are included through a collegial discussion. This is very important to give a more colorful spectrum of purposes with an increasing set of nuances that would allow Universities to overcome reductionist approaches such as rankings, but more important, accomplishing a richer set of multiple missions. According to Furco and Moely (2012), innovation will require some level of institutionalization to structure durable changes.

These few strategies can make discoveries much more effectives, because they may be applied taking into account all dimensions including the human ones. Successful professionals would have an all-encompassing understanding of multiple factors and follow the best possible option that would benefit society, or a particular

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[3] The presidents of Brown, Georgetown, and Stanford Universities and the president of the Education Commission of the States created Campus Compact in 1985. Its main mission is to provide tools and organization for colleges and University to engage in communities to improve them.

[4] Service Learning differentiates from Community Engagement in that it integrates curricular activities that impact learning as part of students' progress to become a professional. Wade and Demb (2009) defined it "as a course-based, reflective educational experience where an organized service activity meets community needs while developing students' academically-based skills and knowledge" (p. 7).

sector of it, as a whole. To do so, graduates need a set of principles and values to make them aware of the implications of their research or professional venture. This is a well-rounded person with a global understanding of reality that can produce a much better development of professional and disciplinary activities enhancing the impact Universities have on students' lives as well as on society.

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